

SBA

SOP 00 15 3

Facilities Management Program

Office of Administration

U.S. Small Business Administration



SMALL BUSINESS ADMINISTRATION STANDARD OPERATING PROCEDURE

National

SUBJECT: Facilities Management Progra	S.O.P.		F
	SECTION 00	NO. 15	

INTRODUCTION

1. Purpose. This SOP outlines SBA's policies and procedures for space acquisition, utilization, management, and all other aspects of facilities management.
2. Personnel Concerned. All employees.
3. Directives Canceled. 00 15 2.
4. Originator. Office of Administrative Services,
Office of Administration.

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Chapter 1

Authority, Policy, and Responsibility

1. **What is the Purpose of this Facilities Management Standard Operating Procedure (SOP)?**

This SOP describes the policies, standards, and procedures that govern the management, use, and acquisition of office space and facilities. It describes functional organizational responsibilities and serves as an easy reference for employees who are responsible for providing these services to carry out the Agency mission. The Small Business Administration (SBA) must be able to control leased space costs while providing a quality workplace environment for Agency staff. The application of standards and guidelines described in this SOP will help SBA reach this goal.

2. **What is the Policy for Facilities Management?**

The SBA policy is to manage office space and facilities resources in accordance with the Agency's operational requirements and financial objectives, and applicable Federal regulations.

3. **Who has the Authority for Facilities Management?**

The Federal Property and Administrative Services Act of 1949, (40 U.S.C. 471 et seq.) establishes the General Services Administration (GSA) as the overall coordinator and provider of office space and related facilities and services to the United States Government. Fiscal and policy oversight responsibilities are assigned to the Office of Management and Budget (OMB).

- a. The GSA issues the basic regulations that govern office space: 41 CFR Chapter 101, Subchapter C, Part 101-17, Temporary Regulations to this chapter; and related bulletins.
- b. Generally, OMB directives are provided in circulars and bulletins that are incorporated in GSA regulations and SBA's management and budgeting procedures. The financial responsibilities of agencies with regard to facilities and the budgetary guidelines must follow OMB budgetary guidelines.

4. **What is the Scope, Purpose, and Objective of Facilities Management?**

- a. Scope. All policies and practices cited in this SOP apply to all SBA organizational units including Service Corps of Retired Executives (SCORE), United States Export Assistance Centers (USEAC), Business Information Centers (BIC), and One Stop Capital Shops (OSCC).
- b. Purpose. The guidelines and procedures in the ensuing chapters must be followed in the acquisition, utilization, and release of space in Federal and leased buildings. They are in accordance with the applicable Federal Property Management Regulations (FPMR) of the GSA.
- c. Objectives. The objectives of facilities management are as follows:
 - (1) Provide space layouts that meet basic functional adjacency requirements, and maximize efficient workflow and communication among organizational units and individual employees;
 - (2) Provide a quality workplace environment for all SBA employees;
 - (3) Provide every employee with sufficient space to perform work efficiently, while utilizing a minimum amount of space;
 - (4) Arrange for expansion, reduction, and rearrangement of the space to meet changing requirements, with a minimum of costs for phones, cabling, construction, and moving;
 - (5) Assist with the excessing of furniture and equipment not functionally required in the operation of the office;
 - (6) Develop accurate budget records and projections;
 - (7) Keep accurate space and facility records to support the identification and correction of billing discrepancies and the proper allocation of space;
 - (8) Maintain accurate records of all field office lease expiration dates to ensure sufficient time for planning changes to space;
 - (9) Stimulate Agency personnel awareness of the proper use and costs of space; and
 - (10) Prepare and submit all space requirement requests to GSA that satisfy the requirements of the FPMR and meet SBA standards and user requirements.

5. **Who in SBA is Responsible for the Facilities Management Program?**

The management of facilities is the responsibility of the Office of Administrative Services (OAS). The OAS works closely with the individual field offices to address space issues. The purpose of the assignment of responsibilities, as outlined below, is to create a structure that is proactive in managing SBA's facilities and maximizes interaction and cooperation between the various levels of SBA, and between SBA and GSA.

- a. The Director, Office of Administrative Services (D/OAS), through the Assistant Administrator for Administration (AA/A), is responsible for:
 - (1) Administering and monitoring all SBA space and facilities programs, and approving or disapproving space and facilities related procurements;
 - (2) Formulating, evaluating, and improving SBA plans and policies on space and facilities management; and
 - (3) Reviewing reports on the cost and effectiveness of SBA space and facilities operations; actual and projected budget requirements; and annual work plans.
- b. The Chief, Facilities Management Branch (C/FMB), through the D/OAS, has overall responsibility for the management of SBA's space and facilities services including:
 - (1) Developing, establishing, and administering plans, policies, standards, and procedures to govern SBA's space and facilities management activities;
 - (2) Establishing and managing Agencywide operations of space and facilities management in accordance with all governing Federal standards, laws, and regulations;
 - (3) Maintaining a computerized inventory of lease expiration dates for all SBA space holdings and notifying field offices 18 months prior to lease expiration;
 - (4) Planning and monitoring Agencywide requests to GSA for acquisition or relinquishment of space;
 - (5) Conducting negotiations for space with GSA for Headquarters and field offices;

- (6) Maintaining liaison with GSA, other agencies, and the industry;
 - (7) Providing technical and administrative assistance to all Headquarters operating components and field offices;
 - (8) Coordinating Headquarters space management services in compliance with this SOP and Federal regulations, including providing technical assistance;
 - (9) Developing Agency space and facilities budget submissions and reviewing space and facilities budget submissions;
 - (10) Representing SBA before Government, public, and private organizations concerned with space and facilities policies, procedures, regulations, rules, and operations; and
 - (11) Developing, coordinating, approving, and submitting, through prescribed channels, all reports required by Federal standards and regulations.
- c. Field Office Heads have general responsibilities for space and facilities resources, daily operation and management, but are not limited to responsibilities for:
- (1) Implementing SBA space and facilities management systems and policies ensuring compliance with same;
 - (2) Satisfying reporting requirements on space and facilities management to D/OAS as required;
 - (3) Assisting in determining the space and facilities needs for offices under their jurisdiction and providing these requirements to the D/OAS; and
 - (4) Ensuring that requested changes in space assignments are cost effective and represent true operational needs.
- d. All Associate Deputy Administrators (ADAs), Inspector General (IG), General Counsel (GC), and Chief Counsel for Advocacy (CC/A), have a general responsibility to assist OAS in the daily operation and management of all space and facilities resources assigned to the office. This includes, but is not limited to:
- (1) Assisting in the determination of space and facilities requirements for units under their control and providing these requirements to D/OAS;
 - (2) Ensuring that requested changes in space assignment or layout are cost

effective and satisfy true operational requirements; and

- (3) Providing information to D/OAS as requested to ensure professional management of all Headquarters facilities and central office duty stations (CODS).

Chapter 2

Basic Considerations in Facilities Management

1. What are the Basic Operating Principles for Facilities Management?

All SBA employees will be located in space that provides a quality workplace environment for all employees. The OAS will work closely with GSA to obtain acceptable space as follows.

- a. Obtain quality office space for the efficient performance of the Agency's mission and programs.
- b. Utilize existing Government-owned permanent buildings and facilities that are adequate or economically adaptable to the efficient performance of the SBA's programs.
- c. Utilize buildings under leases administered by GSA when Federally-owned space is not available.
- d. Reduce Federal work space to essential minimum requirements.

2. What is Space Planning?

Space planning is the process of using the techniques of space programming, layout, and interior design to determine the best location and the most efficient configuration for Agency facilities. It is SBA policy to obtain professional space programming and layout services to achieve optimum space usage at a minimum cost to the Government. Professional services are also required for the successful accomplishment of standard alterations and modifications to existing space. The OAS will work closely with the appropriate GSA office to obtain these professional services for Headquarters and all field offices.

3. What is Space Programming?

Space programming consists of the data gathering and organizational analysis necessary to determine the space needs for an organization. A space program details statistically the space requirements of an organization by function and presents prototypical layouts for typical workstations and support areas. A space program can be building specific if the building to be occupied is known, or generic if the building is undetermined.

For Federal agencies a space requirements program consists of the SF 81, “Request for Space;” SF 81A, “Space Requirements Worksheet;” SF-81A Part 2, “Standard Workspace Design Worksheet;” and Space Requirements Development Guidelines and Questionnaire, submitted to GSA to initiate a request for space. Additionally, a space program may include any or all of the following:

- a. Organizational charts and descriptions that illustrate and describe the workings of a unit;
- b. Bubble diagrams that illustrate working relationships and adjacency requirements for employees and support areas within an organizational unit;
- c. Adjacency diagrams or matrices that illustrate proximity requirements and functional interactions between organizational units;
- d. Charts that indicate the level of visitors (public and employees of other Government agencies) received by organizational unit; and
- e. Stacking plans that illustrates the preferred relationships of organizational units and building support areas within a facility. The stacking plan should reflect the actual building(s) to be occupied, or an ideal hypothetical building if the proposed facility is unknown.

4. **What are Space Layouts?**

Space layouts graphically interpret the detailed information contained in the space program. Drawn to scale, the layout depicts the physical location of offices, reception areas, conference rooms, furniture, equipment, etc., on the floor plan(s) of the building. These locations are based, to the greatest degree possible, on the functional and operational relationships shown on the bubble diagrams, adjacency matrices, stacking plans, and other information contained in the space requirements program.

5. **What is Space Design?**

- a. Space design refers to the steps taken to make the space illustrated in the layout aesthetically pleasing. This includes, but is not limited to: choices of furniture and furniture finishes; wall coverings; paint; floor coverings; draperies and other window coverings; graphics and artwork; and signage.
- b. The final space design package consists of an interior design program that includes finished materials, furniture and furnishings specifications, and procurement data.

The items specified for procurement will be selected, when available, from approved GSA sources of supply.

6. What are Construction Documents?

Construction documents are plans developed from space layouts that indicate walls, doors, lighting, telephone locations, electrical requirements, cabling requirements, weightload considerations, heating and air conditioning requirements, wall covering and carpeting selections, draperies and other window coverings, etc. These documents are used to obtain bids for the proposed work and are the working drawings for the construction.

7. What Services are Available for Layout and Design?

The SBA contracts with GSA or an independent contractor for the layout and design. These include the following.

a. Initial Layout Services.

- (1) The GSA provides space programming and/or layout services for an initial space assignment, for expansion of an existing assignment, or for a GSA initiated move, at no cost to SBA. Requests for these services are made to the appropriate GSA regional office by the D/OAS.
- (2) SBA may also request other services in conjunction with initial layouts such as master planning, macro-level programming, and interior design. Such services are provided on a reimbursable basis and the D/OAS must approve and certify funding before performance of services. The D/OAS will consult with GSA to determine the scope of assistance required.

b. Other Services. The SBA may also request space programming, layout, and interior design services for space actions other than initial layouts, such as reconfiguration of an existing assignment, alterations, reductions, consolidations, requested relocations, and as-built drawings. Such services must be requested by the D/OAS and are provided on a reimbursable basis. The D/OAS must certify the availability of funding before performance of services.

8. Are there any Restrictions on Contracting Layout Services?

Yes, there are restrictions on contracting layout services. The SBA must not contract for layout services if occupying GSA-controlled space without first consulting GSA. The

GSA may provide requested services through use of in-house professional staff or contracted professional space planning firms. If necessary to meet contractual commitments, avoid duplicated services, or ensure cost-effectiveness, GSA may require SBA to use an existing GSA space planning contract or a new contract awarded by GSA.

9. What Happens if Layout Services are not Available?

The OAS may request a project waiver from the above provisions to directly procure layout services if GSA is unable to provide the requested services either in-house or by contract in a timely manner.

10. Who Can Request a Waiver from this Restriction?

The D/OAS is the only person who may request a project waiver.

11. Who Can Initiate the Waiver Requests?

Project waiver requests are initiated by the D/OAS and are made to the GSA regional public building services (PBS) office. The request must document the unavailability of GSA-provided services, the basic scope of services required, and the name, location, and size of the project. If the request is approved by the GSA regional office, OAS will consult with GSA on contract scope, tasks, and deliverables.

12. What are SBA Office Layout Features?

The amount and types of space assigned by GSA to SBA Headquarters and field offices is based on the SF 81, SF 81A, and Space Requirements Development Guidelines and Questionnaire. While these documents establish the parameters for layouts, additional factors must be considered when developing actual space plans.

13. What are the Stages of Developing a Space Layout?

The stages and the type of information required to plan a layout pertain to Headquarters and all field offices. This information can be used to either develop layouts within SBA or as criteria for reviewing layouts developed by GSA or contractors. The following are the stages of developing a space layout.

- a. Stacking Plan. For space assignments with space on more than one floor, a

stacking plan is required that indicates floor assignments for each organizational unit. In developing the stacking plan, pay attention to the following.

(1) Adjacency Requirements.

- (a) Adjacency needs between organizational units must be analyzed to provide the degree of proximity necessary. When determining adjacency needs such factors as workflow, traffic flow, internal communication, employee supervision, and access to support areas must be weighed.
- (b) Units that work closely together, such as units in the same program area, may have a requirement for immediate proximity, typically, same floor. Other units may interact less frequently and require a moderate degree of adjacency to each other. Still other units may have a definite need for physical separation. Consideration should be given to vertical adjacencies as well as horizontal (same floor) adjacencies.
- (c) Adjacency requirements may be presented in adjacency diagrams that graphically illustrate the spatial and locational requirements among units and adjacency matrices that numerically rank the proximity requirements among units. To be effective these documents must be updated to reflect organizational changes as they occur.

(2) Public Visitors. Organizations with a high level of public visitors, including employees of other Government agencies, should be located on the lower levels of a space assignment or in close proximity to public elevators.

b. Block Plans. Block plans for each floor, illustrating the proposed location of organizations, are developed following completion of the stacking plan. These plans are estimations of the space to be appropriated to each unit and may be reconfigured during the space layout phase. Pertinent information to the development of block plans includes the following:

- (1) Public Contact. Organizations with a significant number of visitors from outside the building should be situated near the elevators' main entrance.
- (2) Adjacency Requirements. Organizations with a close working relationship with other units on the same floor should be located in close proximity to each other. Organizations with a proximity requirement with units on another floor should be located near the elevators or a stairwell.

- (3) Support Areas. Support areas such as copy rooms, file rooms, and cash collateral rooms (show weight bearing capacity of floors, number of file cabinets and safes, terminal areas, supply rooms, reference areas, reception areas, etc.) that service more than one organization on a floor should be easily accessible to all of the units served. Support areas for the entire facility should be situated near the elevators.
- c. Space Layouts. Following agreement on the block plans for each floor, space layouts are developed for each organizational unit. The layouts should include the line items listed on Part 1 of the SF 81A and illustrated on Part 2 of the SF 81A. The following points must be considered when developing the layouts.
- (1) Internal Adjacencies. Typically personnel and support functions within the same unit should be grouped together to facilitate internal communication, workflow, supervision, and access to support equipment. Within the unit grouping, differing degrees of adjacencies may be required. For example, the supervisor may require an immediate proximity to the clerical staff and reception area; the clerical staff may have to be immediately adjacent to the files, storage cabinets, and reception area; and the professional staff may require close proximity to each other and a lesser degree of adjacency to the supervisor, clerical staff and support areas.
 - (2) Visitors. Employees who receive visitors should be placed near the office entrance. Reception areas should be kept to the minimum size required.
 - (3) Private Offices. Private offices are provided only when there is a demonstrated functional need; and then they should be only large enough for the occupant to conduct normal business in an efficient manner and with a reasonable degree of dignity.
 - (4) Furniture and Equipment. Unnecessary furniture and equipment must be excessed in a timely fashion in accordance with SOP 00 13, "Property Management."
 - (5) Records. All records must be retired in accordance with retention schedules. See SOP 00 41, "Records Management."
 - (8) Security. Consideration must be given to the level of security needed. Requirements for locks, alarms, other security devices, and direct tie-ins to police and fire departments should be developed. The OAS will coordinate with building management, GSA, and the Federal Protective Service (FPS).
- d. Construction Documents. A series of drawings are required to document

implementation of the final space layout. Drawings should be scaled in 1/8 inch or 1/4 inch scale to obtain the most accurate layout results. The drawings include:

- (1) Demolition/construction plans illustrating existing walls to be removed and new walls to be constructed;
- (2) Reflected ceiling plans showing the removal, addition and relocation of light fixtures, air returns, air diffusers, sprinkler heads, and any other architectural or engineering features located in the ceiling;
- (3) Furniture plans depicting the placement of furniture and equipment;
- (4) Electrical plans showing the addition, subtraction, and relocation of electrical outlets, monuments, switches, etc. The electrical plan also gives the specifications and locations for special electrical requirements;
- (5) Telephone plans illustrating the location of telephone instruments, outlets, and lines;
- (6) Computer cabling plans indicating the addition, subtraction, and relocation of computer cabling and the location of all computer hookups; and
- (7) Weightload plans showing the weight-bearing capacity of floors.

14. **Who Reviews and Approves the Space Layouts?**

- a. In the Field Offices: The D/OAS must review and approve all final organizational layouts for relocations, reorganization, and modifications of space presently occupied by a field office. All layouts submitted for approval must be certified by the field office head and he or she must certify that the current plan or SF 81A is correct.
- b. In Headquarters: All final layouts for relocation, reorganization or modification of Headquarters space must be approved by the D/OAS. All layouts submitted for approval must be certified by the assistant administrator (AA) or the associate deputy administrator (ADA) with program responsibility that the organizational and staffing data reflected on the layout are correct.

GSA must review all layouts in GSA-controlled space to ensure that no adverse impacts on mechanical or utility systems, structural integrity, fire and safety requirements, or assignment management considerations would result.

Chapter 3

Acquisition of Space

1. What are the General Requirements for Space?

It is the policy of SBA to acquire space at locations that provide a quality workplace for all employees and are accessible to client agencies and the general public. To satisfy this requirement, criteria has been established which must be adhered to whenever feasible for the acquisition of space. The OAS will work closely with Headquarters and field offices and the appropriate GSA regional office to facilitate the acquisition of appropriate facilities in a timely manner.

- a. Location. The GSA's location policy assigns responsibility to client agencies for determining the delineated area to be used by GSA when fulfilling space requests, subject to the approval of GSA. The SBA must certify that these location decisions are in compliance with the acts, orders, rules, and regulations set forth in the FPMR.
 - (1) Field Offices. Field office heads are responsible for developing locational boundaries for field offices, under their jurisdiction, subject to approval of the D/OAS and the appropriate GSA regional office.
 - (2) Headquarters. The OAS is responsible for developing the delineated area for all Headquarters components, subject to approval of the D/OAS and the appropriate GSA regional office.
- b. Locational Criteria. When developing delineated areas, the following guidelines must be followed.
 - (1) Executive Order 12072 requires that central business areas (CBAs) be given preference when selecting locations for meeting Federal space needs.
 - (a) The CBA is defined as that area within the central city in a standard metropolitan statistical area (SMSA) or any non-SMSA that encompasses the community's principal business and commercial activities, and the immediate fringes thereof, as geographically defined in consultation with local officials.
 - (b) Typically, SBA mission requirements are satisfied in the CBA or in locations that permit maximum use of existing Federally controlled facilities. If the CBA or a portion of the CBA is selected as the

delineated area, no additional supporting documentation to justify the location decision is required by GSA.

- (2) Although it is Agency policy, if the field office head feels the Agency mission dictates a non-CBA location, it is his or her responsibility to provide the D/OAS with adequate justification to support these locational decisions to GSA.
 - (3) Executive Order 13006 requires that historic properties in our Nation's central cities be given preference when selecting locations for meeting Federal space needs.
 - (4) There should be good access to public transportation, and the office must be easily accessible to the public for assistance from SBA staff and the dissemination of information regarding the various programs of the Agency.
 - (5) The office should be located in an area that is accessible to primary private sector resource partners to facilitate a close working relationship.
- c. Handicap Accessibility. The location must be accessible to the handicapped as mandated by present Federal and State laws and statutes. These rules require that the building be handicap accessible by public transportation and that architectural barriers not impede the movement of the physically handicapped to the facility.
 - d. Parking. Every effort must be made to acquire space in an area where there are commercial parking facilities available at reasonable rates for visitors and employees who travel by private automobile. Agency parking spaces will be limited to one space for the regional administrator, one for the district director, and one for each official Government vehicle permanently assigned to the office, as provided for in the lease.
 - e. Heating and Cooling. Space occupied by the SBA should conform to the typical building standards for heating and cooling for that region of the country, and will also be dictated by the capabilities of the heating, ventilation, and air-conditioning (HVAC) system which services the space.
 - f. Air Quality. Space occupied by the SBA should meet all applicable air quality measurements as established by the Environmental Protection Agency (EPA), the Occupational Safety and Health Administration (OSHA), and GSA.

The GSA will ensure that buildings under consideration to house the SBA are free from asbestos and radon concern. Conformance with these types of issues is the

responsibility of GSA. SBA field offices should report any deficiencies to OAS, who will inform the local GSA office.

- g. Smoking. It is the goal of SBA to have a smoke free environment at all facilities. Areas designated as “smoking areas” must meet certain criteria. Contact OAS for further information.
- h. Elevators. Suitable passenger elevator service should be provided that meets all applicable handicapped requirements. Freight service should be provided when there is substantial movement of supplies, equipment, or both, and the space is located above or below ground level. Suitable combination passenger/freight elevators may be acceptable on a case-by-case basis.
- i. Drinking Fountains. Chilled drinking water should be provided in convenient locations with a minimum of one fountain on each floor occupied.
- j. Lighting. Lighting shall be provided throughout all office areas to produce and maintain a maximum of 50 foot-candles at work stations, 30 foot-candles in work areas, and 10, but not less than 1, foot-candles in nonworking areas. These requirements may be satisfied with fluorescent fixtures, direct or indirect task lighting, ambient lighting, or any combination of the above, as appropriate with the type of furniture to be used.
- k. Flooring. Carpeting is preferred for all office space except in those areas where a resilient floor covering such as tile is required. Floor coverings should be of a color, pattern, or both, that minimizes the appearance of soiling. Carpeting should be replaced according to lease provisions in private space and approximately every 5 years in Federal buildings.
- l. Acoustical Treatment. Ceilings in all office areas should be covered with an approved acoustical material. In addition, special treatment should be given to areas containing noise producing equipment. In office landscape environments, cover all systems and modular furniture screens and panels with a sound absorbent material.
- m. Painting and Redecorating. All areas should be painted prior to initial occupancy, with annual washing thereafter. Repainting in private space should be in accordance with lease provisions. In Federal buildings provisions should be made for repainting at 3-year intervals. This may vary from location to location per the individual lease.
- n. Window Coverings. Venetian blinds, or other window coverings that provide an equal or superior level of light filtering or blockage, should be provided on all

windows. This policy also pertains to offices that receive above standard window draperies.

- o. Janitorial and Cleaning Services. Services provided should be based on a cleaning schedule in accordance with lease terms. The cleaning schedule should include the following provisions.
 - (1) Offices, restrooms, and special purpose areas should be cleaned and trash removed daily. Carpets should be vacuumed at least once a week and floors should be washed at least once a month and waxed at least four times per year.
 - (2) Venetian blinds and other non-fabric window coverings should be dusted monthly and washed annually. Lighting fixtures and other high objects should be dusted monthly. Windows should be washed bi-monthly inside and quarterly outside.
 - (3) The OAS can provide offices with a copy of the lease from GSA to determine the janitorial services that have been agreed to by the owner and ensure compliance.
- p. Security. Adequate security must be provided to ensure the safety of SBA employees and visitors. Space occupied by the Agency must be located and/or designed so that it can be totally secured by extra security guards or locked doors.

2. **What are the Requirements for Obtaining Space?**

All requests for additional space must be submitted to OAS. The OAS will review the information to determine whether the space request is justified, and, if justified, whether requirements can be satisfied within current SBA controlled space. If OAS determines that sufficient space is not available in the existing inventory, OAS will complete an SF 81, SF 81A, and Space Requirements Development Guidelines and Questionnaire for submission to GSA. The GSA will make the effort to use existing Government-owned permanent buildings and facilities which are adequate or economically adaptable to the efficient performance of the Agency's programs, or leased buildings to GSA when Federally-owned space is not available.

3. **What Sources Does GSA Use for Obtaining Space for SBA?**

There are three sources GSA uses for obtaining space. They are as follows.

- a. Vacant Space Inventory. The GSA will review the inventory of Federally-owned facilities within the delineated area to determine if suitable space is available.
- b. Leasing of Privately-Owned Buildings. If GSA determines that Government-owned space is not available, GSA will review Federal lease holdings for space that satisfies the Agency's requirements. If appropriate space is unavailable, GSA will procure leased space within the delineated area.
- c. Construction of New Government-owned Facilities. The GSA may also elect to construct a new facility to meet Government space requirements within a region. Typically, new construction is used to consolidate a single Agency at one location, or to consolidate a group of agencies at a single building. Construction of a new facility generally is used to meet long-range space requirements to accommodate the long lead time required for building construction.

4. **Who has the Responsibility for Authorizing All SBA Office Space Requests?**

The responsibility for authorizing all requests for space in all SBA field offices, except temporary disaster site offices, remains with the D/OAS.

- a. To carry out this responsibility, all field offices, except temporary disaster offices, shall make the determination of their space needs and make their request to the D/OAS. When determining space requirements, the rules, regulations, and policies set forth in the FPMR and this SOP must be followed. The OAS will provide technical advice on these.
- b. The OAS will prepare and submit an SF 81, SF 81A, and Space Requirements Development Guidelines and Questionnaire for review by the field office head. After review and certification by the field office head, and approval by the D/OAS. The OAS will submit the space request package directly to the appropriate GSA regional office.

5. **Who Oversees Requests for Additional Space and Layout Modifications for All SBA Offices?**

Authorization for all space requests for SBA offices is the responsibility of the D/OAS.

- a. All field office heads must submit their requests to the D/OAS for their additional space requirements, and submit their organizational and personnel information to OAS in sufficient detail to justify additional space or layout changes. When determining space requirements, the rules, regulations, and policies set forth in the

FPMR and this SOP must be followed.

- b. If, in the opinion of the D/OAS, an increase in space or a realignment of presently authorized space is justified, OAS will initiate proposed changes with GSA.

6. **What are the Reasons for Requesting Space?**

- a. Program Expansion. New program requirements, the upgrading of a field office, for example, from a branch office to a district office or an increase in staff may generate the need for additional space.
- b. Lease Expiration. The OAS will prepare an SF 81 prior to a lease expiration, for field office head review, certification, and approval by the D/OAS.
 - (1) OAS will maintain a comprehensive inventory of field office lease expiration dates and fully monitor this information. This data will be shared with the Administrator, Deputy Administrator, Associate Deputy Administrator for Management and Administration (ADA/M&A), AA/A, the Office of Field Operations, and the field office head.
 - (2) The GSA will conduct an analysis of all SBA occupied leased space to determine if it is cost effective to the Government to seek alternatives approximately 18-24 months prior to lease expiration. As part of this review, SBA will be asked to submit an SF-81 and SF-81A, and other supporting documents as requested, to determine space needs.
- c. Consolidation. Requests for space for consolidation may be initiated by SBA to improve operational efficiency and effectiveness, or by GSA as part of a policy to continually review the opportunities for consolidating several locations.
 - (1) If field consolidation is initiated by SBA, OAS must complete an SF 81, SF 81A, and Space Requirements Development Guidelines and Questionnaire for submission to GSA through the D/OAS.
 - (2) If field consolidation is initiated by GSA, GSA will prepare an economic analysis that demonstrates the cost-effectiveness of the consolidation. The SBA field offices are responsible for providing all necessary information to OAS, which will prepare the SF 81, SF 81A, and Space Requirements Development Guidelines and Questionnaire. Upon approval by the D/OAS, the space package will be forwarded to GSA.
- d. Forced Move. As the landlord for space controlled by the Federal Government,

GSA may request that the SBA relocate to accommodate the expansion or relocation of another agency if it is deemed to be in the best interest of the Government.

- (1) When a forced move is initiated by GSA, OAS must complete an SF 81, SF 81A, and Space Requirements Development Guidelines and Questionnaire for submission to GSA through the D/OAS.
 - (2) GSA will target 2 to 3 years of advance notice between the time it asks SBA to relocate as part of a forced move and the actual move date imposed. The nature of forced moves, however, may dictate a shorter advance notice.
- e. Emergency Relocation. An emergency relocation results from an extraordinary event such as a fire, natural disaster, or immediate threat to the health and safety of occupants of the space that renders the current space unusable and requires that it be vacated. In such cases, GSA will serve as the central coordinator in obtaining any approvals and funding authorizations required from OMB and Congress. The OAS must provide, through the D/OAS, any information required by GSA including the SF 81, SF 81A, and Space Requirements Development Guidelines and Questionnaire.
- f. Disposal of Space. The OAS shall promptly report to GSA any space that is excess to present requirements for assignment to other agencies. The D/OAS must notify the appropriate GSA regional office at least 120 calendar days before vacating space. Notification must be in writing, giving a description of the space and the estimated date of release.

7. **What are the Basic Procedures for the Acquisition of Space for Field Offices?**

- a. Following a determination by OAS that a realignment, change, or move with regard to authorized space seems justified, OAS, through the D/OAS will contact the appropriate GSA regional office. Within 2 weeks of the initial contact, GSA will formally acknowledge the initial contact via letter, and will identify a GSA point of contact. The Agency will be asked to assemble preliminary information and to notify the GSA contact when the information is available.
- b. Concurrently, OAS must initiate and submit a space requirements package for approval to the D/OAS. The space requirements package must consist of a delineated area letter that establishes and justifies a proposed boundary area for a facility location; an SF 81, SF 81A, Space Requirements Development Guidelines and Questionnaire; and other information and justifications as required.

- c. In developing their space requirements to be submitted to OAS, field offices must:
 - (1) Identify the reason for requesting space;
 - (2) Define the functions of the space to be designed;
 - (3) Include current and projected staffing and activity levels;
 - (4) Analyze present and future space and adjacency requirements including the total office, storage, and special space required;
 - (5) Provide criteria for location of the office; and
 - (6) Cite proposed delineated area.
- d. The total space requirement must be 125 square feet or less per person for primary office or people space. The office support space cannot exceed 22 percent of the primary office space. Strong emphasis must be placed on Agency documentation of all support area requirements. The final office space should reflect the optimum square footage required for the activity involved at the least possible cost to the Government.

8. **What are the Basic Procedures for Acquiring Space for Headquarters?**

- a. Following a determination by the D/OAS that the space requirements of a Headquarters component cannot be satisfied within current SBA space, OAS will inform the GSA regional office that SBA will be submitting a request for space. The GSA will formally acknowledge the initial contact via letter, and will identify a GSA point of contact. The Agency will be asked to assemble preliminary information and to notify the GSA contact when the information is available.
- b. The OAS will work closely with the requesting office to develop a space requirements package consisting of a delineated boundary area for a facility location, an SF 81, SF 81A, and Space Requirements Development Guidelines and Questionnaire, and other information and justifications as required.
- c. In developing the space requirements package the requesting office and OAS must follow the procedures outlined in paragraph 3-7c.

9. **What is a Request for Space, SF 81?**

- a. The SF 81 is an application prepared and submitted by OAS, through the D/OAS, to GSA. The SF 81, when approved by the D/OAS and forwarded to GSA, becomes GSA's authority to search for and locate either Government-owned or leased space which, in their opinion, is suitable to the needs specified in the request.
- b. The information developed for the SF 81A, is summarized on the SF 81. In addition, special requirements for the space listed on the Space Requirements Development Guidelines and Questionnaire must be explained in detail on the SF 81.
- c. A sample form and instructions for completion of the request for space are contained in appendix 3. Particular attention must be paid to the instructions for providing space requirements for Local Area Network (LAN) room, office automation, and telecommunications equipment.

10. **How is the Delineated Area Determined?**

- a. SBA is responsible for determining the delineated area for all space requests. Within SBA, responsibility for development of delineated areas is as follows:
 - (1) The field office head and the D/OAS are responsible for determining the delineated area for all field offices under their jurisdiction and documenting the justifications for a delineated area as required;
 - (2) The D/OAS is responsible for delineated area development for Headquarters activities and documenting the justifications for a delineated area as required; and
 - (3) The D/OAS has final approval authority for all space requests and must certify that all applicable rules and regulations have been adhered to in the development of the delineated area.
- b. The SF 81's referred by OAS to the D/OAS for submission to GSA, must contain an attachment that includes the following.
 - (1) Geographic service area for the office, if applicable. If the activity does not have a geographic service area, then that fact should be noted and justified.
 - (2) Delineated area for office location stated in terms of specific boundaries, wherever possible. The delineated area must be based on mission needs and must be a CBA or include part of a CBA. A written justification by the

field office head is required if a non-CBA location is specified.

- (3) Brief supportive statement summarizing the basis for the delineated area. While in most cases it is not necessary to submit a full justification with the SF-81, such justification with supporting documentation should be available for review by the D/OAS and GSA. The justification should be based on decision-making factors related to program mission and may include, but are not limited to, such items as:
 - (a) Geographic service area;
 - (b) Travel time required to reach outlying field offices or inspection sites;
 - (c) Program needs that require close proximity to the location of courts, offices, or other agencies;
 - (d) Personnel hiring and retention as it relates to accomplishing program mission; and
 - (e) Proximity to other amenities such as eating facilities and public transportation.
- (4) Following statement signed by the D/OAS: “I acknowledge that the delineated area identified in the request is in compliance with all laws and Executive orders governing the location of space, including the Rural Development Act of 1972, 42 U.S.C. 3122; and Executive Order 12072, August 16, 1978.”

11. **What is the Space Requirements Worksheet, SF 81A?**

The OAS must complete the “Space Requirements Worksheet,” SF 81A, for all employees and functions to be housed in the requested space.

- a. Part 1 provides a summary by authorized positions; type of support space; and amount of space and furniture required.
- b. Part 2 is a standard workspace design for each workstation or common function workspace with the dimensions of the workspace, furniture needed, and the square feet required.
- c. Both Part 1 and Part 2 of the SF 81A should reflect the actual requirements for

furniture and space by function; not the furniture and square footage presently occupied.

- d. A sample form and detailed instructions for completion of the worksheet are contained in appendix 4.

12. **What is a Space Requirements Development Guidelines and Questionnaire?**

The Space Requirements Development Guidelines and Questionnaire contain questions designed to assist in the space planning for requested space. Instructions for completion of the Space Requirements Development Guidelines and Questionnaire and a sample questionnaire are in appendix 6. The OAS will work closely with field offices and the appropriate GSA regional offices to complete the questionnaire.

13. **Use of Cooperative Administrative Support Unit (CASU) Facilities.**

In many cities CASUs have been established to provide more cost effective support services and facilities to Federal agencies. The SBA field offices should consider joining local CASUs as a cost effective source for access to physical fitness/wellness facilities, day care centers, storage facilities, and other facilities as may be offered in their individual Federal complexes.

14. **How is Space Acquired for Wellness/Fitness Facilities?**

The establishment of a physical fitness program, as part of a comprehensive occupational health program, is encouraged for all SBA offices. A physical fitness program may be provided by the SBA alone, in conjunction with other agencies, or as a member of a CASU.

- a. A wellness/fitness facility is SBA-controlled if the facility is for the sole use of the SBA or if the SBA is the lead Agency in a multi-tenancy building.
- b. To acquire space for an SBA-controlled wellness/fitness facility in the field, the D/OAS must submit to the appropriate GSA regional office: an SF 81 detailing space requirements, and a detailed plan for the proposed fitness program.
- c. The fitness program plan must indicate that each of the following elements have been considered or are already provided under existing Government sponsored activities:

- (1) A survey indicating employee interest in the program;
 - (2) A 3 to 5 year implementation plan demonstrating long-term commitment to physical fitness and health for employees;
 - (3) A health related orientation, including screening procedures, individualized exercise programs, identification of high-risk individuals, and appropriate follow-up activities;
 - (4) Identification of a person skilled in prescribing exercise to direct the fitness program;
 - (5) An approach which will consider key health behavior related to degenerative disease, including smoking and nutrition;
 - (6) A modest facility that includes only the essentials necessary to conduct a program involving cardiovascular and muscular endurance, strength activities, and flexibility; and
 - (7) A provision for equal opportunities for men and women, and all employees, regardless of grade level;
- d. Depending on the scope and goals of the proposed program, one or more of the above elements may not apply or may apply only partially or indirectly. However, every attempt should be made to show that each of the above has been considered in the planning effort or are already provided under existing programs and activities sponsored by SBA, Public Health Service (PHS) health unit, employee association, or other official organization within SBA.
- e. Wellness/fitness facility space is classified by GSA as follows:
- (1) Exercise rooms are treated the same as conventional office space;
 - (2) Locker rooms are treated as conventional office space;
 - (3) Shower rooms are treated as lab and clinic space, SP 1; and
 - (4) Physical fitness facilities in multiple tenancy buildings are assigned as joint-use space.
- f. Exercise equipment, lockers, and the purchase and installation of nonstandard interior finishes are the responsibility of SBA in facilities that are for sole use of the SBA. In joint-use facilities these expenses are prorated among participating

agencies.

15. How is Space Acquired for Child Care Centers?

The establishment of a child care program is encouraged for all SBA locations where feasible. The GSA is authorized to provide child care centers in GSA-controlled space, pursuant to 40 U.S.C. 490b.

A child care center may be provided by the SBA alone, in conjunction with other agencies, or as part of a CASU.

- a. The SBA field offices seeking to establish a child care center for the sole use of SBA employees or as the lead agency in a shared facility must forward to the D/OAS, for Agency review and submittal to appropriate GSA regional office the following:
 - (1) An SF 81 detailing the space requirements for the facility; and
 - (2) A needs assessment survey indicating sufficient Agency interest in a child care center.
- b. Following approval of the space request GSA may provide the space by the following means.
 - (1) Leasing Space for a Child Care Center. When necessary, GSA will acquire leased space to house a child care center or to relocate SBA activities displaced by a child care facility established in GSA-controlled space. Space leased specifically for child care shall have a lease term not to exceed 5 years.
 - (2) Developing a Child Care Facility Out of Existing Assigned Space. If a portion of space presently assigned to SBA is made available for child care center use, SBA will fully reimburse GSA. However, if any of the alterations result in a higher space classification, GSA will fund the alterations for the upgrading of the space to be classified.
 - (3) Use of Modular Buildings for a Child Care Facility. The GSA may lease or purchase modular buildings for child care use.
 - (4) New Construction for Child Care. Space solely for the purpose of providing a child care center will not be made available by GSA through new construction.

- c. Following approval of the space request by GSA, SBA, as sponsor of the day care center, will be responsible for:
 - (1) Allocating space under license or other appropriate authorization document to either the provider of child care services or an employee user group; and
 - (2) Paying rent to GSA for the assigned space.
- d. Furnishings for the child care facility are the responsibility of the licensed child care provider or the employee user group.
- e. Special Buildout Considerations. Child care center space will have all built-in features such as kitchen counters, shelves, cabinets, bookcases, closets, mailboxes, sinks, and basins required throughout the center, furnished and installed as part of the normal buildout.
 - (1) All restrooms for use by children from the center should contain child-size toilets, handicapped accessible toilets, and child accessible drinking fountains.
 - (2) Floors in child care centers shall be covered with an acceptable grade of anti-static carpet or tile as appropriate.
 - (3) All landscaping required for outdoor play areas will be covered by GSA as a part of the standard alterations for a child care center. The SBA is responsible for the purchase and installation of playground equipment.
- f. Special Cleaning Provisions. For reasons of safety and health, the entire child care center will be cleaned in the same manner as health unit space, regardless of the space classification.
- g. Special Safety and Environmental Considerations. Every effort shall be made to minimize safety and environmental hazards in the child care center space, play areas, and adjacent areas of a building frequented by children.
 - (1) Construction work on a center shall be done in a manner which will minimize sharp corners, tripping hazards, or other problems which may increase the potential for injury to children.
 - (2) All lead base paint, even lead base paint in layers below existing coats, shall be removed from all surfaces in space to utilized as a child care center.

16. What are the Procedures for Requesting Space for Temporary Disaster Offices?

- a. Due to the very nature of the office and the time element involved, the procedure for the establishment of temporary disaster offices varies from the normal. Each director, disaster area office (D/DAO) has the authority to contact the local GSA offices regarding space needs when establishing a temporary disaster office. However, the D/DAO must notify OAS by telephone of the approximate square footage, estimated cost, anticipated personnel, and location of the disaster office being established. As soon as practicable after required data has been confirmed, the D/DAO must complete a confirming SF 81, with an OAS number in block 2 obtained from OAS, and submit it to the GSA regional office with a copy to OAS.
- b. Initially, every effort should be made to acquire free space. If, however, free space cannot be acquired all negotiations with the lessor must be handled through GSA (see FPMR 101-17.002). When negotiations for free space are effected, the SF 81, being forwarded to OAS, must specifically stipulate free rental and any other terms of agreement, that is, payment of electricity, heat, etc. A signed statement from the lessor must be obtained relating to the facts of an agreement for the agreement to remain in effect. Space should be accepted "as is."
Construction and/or alteration of the space is not authorized.
- c. If it is subsequently determined that a temporary disaster office shall become a permanent office of SBA, authority to request new space, modify existing space, or both reverts to the D/OAS, and the procedures set forth in this SOP must be followed.

17. What are the Procedures for Acquiring Space for Central Office Duty Stations (COD) in the Field?

- a. Personnel of COD located in the field are Headquarters employees and are administratively supported by OAS. Offices that have employees located in the field include, but are not limited to, the following: Chief Financial Officer, Equal Employment Opportunity and Compliance, Financial Assistance, Investment, General Counsel, Inspector General, and Government Contracting. In general, the same principles and techniques as for other Headquarters employees will be used for CODs.
- b. In each COD, an employee may be designated to act in the capacity of administrative officer, authorized to deal with OAS in regard to space. The designated employee must follow the same policies and procedures as field offices for the acquisition and utilization of space and must coordinate actions with OAS.

18. What are the Procedures for Acquiring Space for Post-of-Duty Stations (POD)?

In the establishment of POD space, every effort should be made to occupy free space. When rent free space is not available, the field office must make an effort to accommodate this group within their office. When this is not possible, OAS will seek space to lease through GSA and the space request procedures outlined in this SOP apply. All negotiations with lessors will be handled by GSA.

19. What are the Procedures for Obtaining Conference Facilities?

a. Headquarters.

- (1) Advisory boards and committees are established, as necessary to achieve the purposes of the Small Business Act and the Small Business Investment Act of 1958, as amended. The SBA can rent temporary space to enable the boards and committees to meet. Specifically, PL 90-104, section 106 amending paragraph 13 of section 8b of the Small Business Act, authorizes SBA to rent temporarily within the District of Columbia or elsewhere, such hotel or other accommodations as are needed to facilitate the conduct of meetings necessary for the advisory boards and committees.
- (2) The rental of conference facilities for any other purpose in the Washington metropolitan area is prohibited by law.

b. Field Offices. Field offices are authorized to rent conference space provided no Federally-owned conference facilities are available.

20. What are the Procedures for Obtaining Space for the Service Corps of Retired Executives (SCORE)?

The SCORE local chapter should make every effort to obtain donated space for the SCORE volunteers.

The Small Business Act provides for the use of office facilities and related materials, and services in support of SCORE. In this context, office facilities includes space, desks, tables, chairs, files, and telephones.

- a. Such space should be the minimum required to function efficiently and professionally and must not exceed the limitations established in the FPMR.

- b. In areas where SCORE offices are co-located with SBA field offices, space requests submitted by OAS for the field office must list the SCORE volunteers as employees and indicate other space requirements for the program.
- c. In communities where there are no SBA field offices or rented quarters, OAS will cooperate with the field office head in obtaining part-time facilities, either free or through a purchase order rental, substantially below market rate, from Chambers of Commerce, municipal, county, or State governments, or civic groups wherever possible. If neither free space or rental space substantially below market rate are available, OAS should explore other agreements for space in the best interests of the Government such as paying utility costs in exchange for SCORE space.
- d. If the field office head determines that there is no free space or rental space substantially below market rate available, the OAS must request space in accordance with this SOP.

21. What are the Procedures for Obtaining Space for the Business Information Centers (BIC)?

The current Agency policy for obtaining space for a BIC is for the field office head to attempt to obtain donated space. In order to place a BIC in existing office space, the field office head must receive approval from the D/OAS. No additional space will be provided for the BICs.

22. Review of Field Space Requirements Documents by OAS.

- a. Responsibility for controlling all requests for space in Headquarters and each regional, district, and branch office (or subsidiaries thereof), and permanent disaster offices remains with the D/OAS.
- b. OAS, through the D/OAS, is responsible for:
 - (1) Preparing and reviewing all space requirements documents; and
 - (2) Forwarding to the field office head for review and certification.

The purpose of this review is to ensure that the submission is in accordance with applicable GSA and OMB regulations, guidelines, and circulars, and conforms to SBA policy.

- c. The process used by OAS to review space requirement packages is described

below.

- (1) SF 81A, Part 1 is reviewed to ensure that:
 - (a) The organizational unit described is clearly marked in the appropriate box;
 - (b) The standard workspace code is clearly labeled for all positions and workspaces;
 - (c) The employee name or vacancy, functional title and grade are entered for each position and that support spaces are labeled by function;
 - (d) The space type, enclosure type, and square feet required for each line item are clearly marked and are appropriate to satisfy functional requirements;
 - (e) Furniture requirements are correctly entered and are appropriate for the position or support space to which assigned (careful attention must be paid to ensure that excess furniture is not listed on the form); and
 - (f) Remarks for special requirements are in sufficient detail to justify requirements and to provide explanations and guidance to GSA.
- (2) SF 81A, Part 2 is used to layout workstations and support areas to justify square footage allowances and furniture allocations. The worksheets are reviewed by OAS to ensure that:
 - (a) The sizes of workspace and support areas and the furniture and equipment allocated to these spaces are efficient and the minimum needed to accomplish functional requirements;
 - (b) The layouts are correctly labeled with the dimensions of the space and the square footage corresponds with the figure shown on Part 1 of the SF 81A; and
 - (c) The furniture and equipment illustrated in the layout and summarized on the top of the form matches the furniture and equipment listings on Part 1.
- (3) SF 81 is reviewed by OAS to ensure that:

- (a) The total number of personnel to be housed in the space requested (item 11) are consistent with budget submissions to the Office of Management and Budget (OMB) and should represent the highest expected level of occupancy including permanent employees, temporaries, part-time seasonal, contractual employees, budgeted vacancies, and volunteers;
 - (b) The total column for item 12(a) and the square footage for primary office area and office support area equals the sum of the square footage figures for the equivalent line/category entered on the SF 81A, Parts 1 and 2;
 - (c) The square footage per person in the primary, that is people occupied, office area is reasonable (not to exceed 125 square feet per person);
 - (d) The space allowance for the office support area does not exceed 22 percent of the primary office requirement;
 - (e) Special Requirements and services (item 13) are in sufficient detail for GSA to satisfy the requirements, and the information is consistent with the answers provided on the Space Requirements Development Guidelines and Questionnaire; and
 - (f) The agency request number (item 2), the local agency contact (item 3), the agency market survey representative (item 4), and the term of occupancy (item 10) are entered.
- (4) The delineated area letter is reviewed by OAS to ensure that:
- (a) The geographic service area is clearly defined, or that the absence of a geographic service area is justified; and
 - (b) The delineated area is clearly defined and justified on the basis of mission requirements.

23. **Who Authorizes Approval of Requests for Space?**

- a. The SBA approval of all space acquisitions is the sole responsibility of the D/OAS, and therefore, Block 14 of the SF 81 should carry his or her typed name and title. In signing the SF-81, the D/OAS certifies: the need for the space requested; that funds are available to pay for the space and alterations; that the delineated area

was designated in accordance with appropriate laws and executive orders and meets Agency mission needs; and that an Agency representative, by name, is available to accompany GSA on the market survey. In the case of approval, OAS will:

- (1) Submit the SF 81, SF 81A and Space Requirements Development Guidelines and Questionnaire and the delineated area justification letter directly to the local GSA office; and
 - (2) Forward a final copy to field office.
- b. If the D/OAS indicates rejection, requests further justification, or requires other clarifications, it is the responsibility of OAS to contact the specific office for which the request was initiated and aid them in attaining requested data before resubmitting it to the D/OAS.

24. **How Does GSA Review Space Requests?**

The GSA employs professional methods and techniques of space analysis, planning, and programming in reviewing space requests. The purpose of the review is to ensure that requests meet all of the requirements established in the FPMR and that utilization rates are held to the minimum square footage per person for the particular activity. The GSA will implement policies and procedures to ensure that approvals of workstation and support space assignments are consistent throughout its regional offices.

25. **Are There Any Exceptions to Submitting SF 81's?**

Don't file an SF 81 with GSA when the space desired or to be acquired is:

- (1) General purpose office space of 2,500 square feet or less, falling within the geographical area where leasing authority has been delegated to SBA;
- (2) Special purpose space of 2,500 square feet or less irrespective of geographical location; and
- (3) Space for short-term use, such as conferences, meetings and emergency situations. Field offices having such a need must make inquiries regarding availability to OAS. The OAS will contact GSA regional offices and document such inquiries. If no suitable Government-controlled facilities are available, OAS may arrange for the use of privately owned facilities for a period not to exceed 180 days, provided that any extensions beyond 180 days are approved by GSA.

26. **What Does GSA Do With Our SF 81?**

Upon review and approval of the SF 81 and supporting documents, GSA and SBA will develop a delivery schedule for the space which becomes part of the SF 81. At this point, GSA signs the SF 81 and the delivery process begins. If no suitable Federally-controlled space is available, GSA will advise the SBA by returning a signed copy of the SF 81, showing the action to be taken.

a. Solicitation for Offers (SFO).

- (1) The GSA will develop an SFO to acquire the necessary space if it determines that the available space in the rental inventory does not meet the requirements of the approved SF 81. The SFO states in detail the specifications and requirements for the space to be procured.
- (2) The OAS must work closely with GSA to ensure that the SFO contains the general requirements and any other requirements that are specific to the solicitation.
- (3) The OAS must provide all information requested by GSA required for the development of the solicitation.
- (4) The SFO must be approved by the D/OAS, after review by the field office head.

b. Market Survey.

- (1) The GSA and SBA will conduct a market survey of the facilities that respond to the SFO and meet the requirements therein. This survey will help verify the information presented in the written response to the SFO.
- (2) The OAS will designate an official to accompany GSA on the market survey. This person will also serve as the Agency's daily contact with GSA for all related activities.

27. **Can SBA Request Delegation of Authority to Acquire Space?**

Yes, the SBA may request delegation of authority from GSA to acquire space when it is deemed to be in the best interest of SBA. The D/OAS must make a determination based on all pertinent information that it is in the best interests of the SBA to seek such a

delegation, and submit a detailed explanation of the potential benefits in writing to the SBA Administrator, for approval.

- b. Upon written request from the SBA Administrator, the GSA Administrator, may delegate authority to acquire space by lease when, in GSA's sole opinion, the delegation is in the best interests of the requesting Agency and the Government. The GSA will specify the terms and conditions of any delegation in writing at the time the delegation is made.
- c. If GSA delegates authority to acquire space to SBA, the D/OAS is required to:
 - (1) Comply with the terms and conditions specified in the delegation;
 - (2) Comply with the FPMR including relevant sections of Part 101-17 and other pertinent portions of Subchapter D Public Buildings and Space; and
 - (3) Make every effort to use existing Government-controlled facilities before acquiring new space. The D/OAS, as delegated, must make inquiries to the appropriate GSA regional office regarding the availability of Government-controlled space. Lease files must be documented with the date of contact and the name and position of the GSA individual contacted if such space is not available.
- d. If the Agency has been delegated acquisition authority by GSA, the D/OAS may proceed to acquire the requested space, consistent with existing laws and regulations, or may request that GSA take necessary action to acquire space.
 - (1) With delegated acquisition authority from GSA, the D/OAS has authorization to enter into lease negotiations and to sign lease agreements.
 - (2) Negotiation authority may be delegated to the Chief, FMB, however, all lease agreements must be signed by the Director, OAS.
 - (3) The copy of the SF 81 signed by GSA, if required, shall be attached to the leasing or related instrument and made available to the General Accounting Office (GAO).

28. **What Steps are Involved in the Approval of a Layout?**

Professional space programming and layout are necessary preconditions to achieving optimum space usage at a minimum cost to the Government and for the successful accomplishment of standard level alterations and modifications to existing space.

- a. Following approval of the SF 81, GSA will provide space programming, layout services, or both for an initial space assignment, for expansion of an existing assignment, or for a GSA-initiated move at no cost to SBA. All requests for space programming and layout services must be made to the appropriate GSA regional office by the D/OAS.
- b. When overall moves are necessary, all final organizational layout and space plans must be approved by the D/OAS. All plans submitted for approval must be certified by the field office head that the current SF 81A is correct.
- c. The requirements for approval by the D/OAS also apply to layout changes in space already occupied.

29. **Who Approves Construction Projects?**

Written approval must be obtained from the D/OAS for all projects before they can be initiated. The GSA Form 2957, "Reimbursable Work Authorization," must be signed by the AA/A for all SBA offices.

- a. If construction costs for renovating or remodeling space exceed \$25,000, or if costs are to be funded, in whole or in part, by OAS, OAS will prepare and submit the GSA 2957 to GSA.
- b. If construction cost for renovating or remodeling space is less than \$25,000 and funded entirely by the field office, OAS will prepare and submit GSA 2957 to the field office head. After certification by the field office head and signature by the AA/A, OAS must submit a GSA 2957 directly to the appropriate GSA field office with the field office's budgetary authorization code. (The \$25,000 limit corresponds to the typical authorization restriction on GSA building managers; projects exceeding this limit must be approved at a higher level within GSA.)

30. **Who Negotiates with the Lessors?**

- a. Non-delegated Leased Buildings. The GSA is responsible for all negotiations with lessors for all Federally-leased space unless a delegation agreement is in effect with SBA.
 - (1) Regional, district, branch, and disaster offices are not authorized to negotiate with lessors or other sources for alterations, utilities, for space modifications or other changes, or services of any nature with regard to the

lease. The D/OAS is the only person authorized to negotiate with the lessor.

- (2) The GSA will conduct all negotiations with lessors to enforce lease provisions or changes therein, and will arrange for the necessary alterations, utilities, or other related services which are not furnished by the lessor in accordance with the lease, and as agreed to by the Director, OAS.
- b. Delegated leased buildings. Where the SBA is the sole Federal Government tenant in a leased facility, GSA may delegate some or all of the building and lease management functions to the Agency at the SBA's request.
 - (1) Field office head must initiate requests for a building management delegation through the D/OAS.
 - (2) If a delegation is approved by GSA for a building in the field, a contracting officer's technical representative (COTR) must be named by the D/OAS.
 - (3) The COTR will represent the GSA contracting officer in contact and negotiations with the lessor to the level authorized by the delegation of authority agreement. Such agreements may include, but are not limited to, negotiating with the lessor or other sources for space modifications and alterations and monitoring building services provided to ensure that the lessor satisfies the terms of the lease.

31. **Who is Responsible for Relocation Costs?**

The funding responsibilities for an Agency move differ based on the reason for requesting space classification of space, and the type of expense.

- a. Classifications of Space. Space assigned to the SBA is classified by GSA into three categories based on the use of the space and the physical alterations made to the space.
 - (1) Office Space. Office space is space which provides a suitable environment in its present state for an office operation, and which includes, among other features, adequate lighting, heating and ventilation, floor covering, finished walls, and accessibility.
 - (2) Storage Space. This refers to space that is unfinished and is unsuitable for office type activities. Storage space is further classified as general storage areas (ST1), inside parking (ST2), and warehouse areas (ST3).

- (3) Special Space. This refers to space which has unique architectural features, requires the installation of special equipment or requires varying sums to construct, maintain, and operate as compared to office and storage space. This space is further defined according to one of the following subsets: laboratory and clinic areas (SP1); food service areas (SP2); structurally changed areas (SP3); automatic data processing (ADP) areas (SP4); conference, classroom, training, and library facilities with supplemental air-conditioned areas (SP5); light industrial areas (SP6); and quarters and residential housing (SP7).

b. Types of Expenses.

- (1) Standard Alterations (SAs). The SAs are those alterations necessary to prepare an Agency's space to meet a particular classification and to satisfy requirements for occupancy of the space. Consistent with its responsibility to provide commercially comparable space, GSA will fund the cost of SAs.
- (2) Above-Standard Alterations (ASAs). The ASAs are those alterations that enhance the space but are not required to allow for occupancy of the space.
- (a) The Agency is responsible for:
- (i) The cost of its own above-standard alterations if the relocation results from a lease expiration or Agency expansion; and
 - (ii) The above-standard costs incurred by a displaced Agency when SBA expansion displaces the Agency.
- (b) GSA is responsible for:
- (i) All expenses if a GSA directed consolidation does not correspond with lease expiration; and
 - (ii) All alteration expenses incurred during an emergency relocation.
- (3) Whether an alteration is standard or above-standard is dependent on the classification of the space to be altered. Appendix 7 presents a detailed breakdown of what alterations are standard or above-standard.
- (4) A summary of relocation situations and identification of the responsible

party (GSA, SBA, or displaced Agency) for the different types of expenses, is shown in appendix 8.

32. What Forms of Review or Appeal are Available to SBA Regarding Space Assignments?

- a. Formal Review. The SBA may request a formal review of a space assignment or space acquisition from the appropriate GSA regional office. The appeal must be in writing and must include all pertinent information and supporting documentation. The field office head is responsible for preparing appeals for field assignments. Preparation of appeals for Headquarters space assignments are the responsibility of the Chief, FMB. The appeal must be signed by the D/OAS. The GSA Real Estate Division will verify the data, perform additional investigations, as necessary, and issue a decision.
- b. Initial Appeal.
 - (1) Within 15 calendar days after receiving the decision from GSA, the Director, OAS, may submit an appeal of the decision to the regional administrator in the appropriate GSA regional office.

The appeal must state, in writing, the basis for the request for formal review.
 - (2) Within 15 calendar days of receipt of SBA's appeal, the GSA regional administrator, will notify SBA of his or her decision. In cases requiring more detailed analysis than can be accomplished within this time frame, the GSA regional administrator will notify SBA and establish a date on which the decision will be rendered.
- c. Final Appeal. Within 15 calendar days after SBA has been notified of the GSA regional administrator's decision, a final appeal may be filed by the SBA Administrator to the Administrator of GSA. The GSA Administrator will render GSA's final decision within 30 calendar days of receipt of the appeal whenever possible. If additional time is required, the GSA Administrator will notify SBA of the date a decision will be made.

Chapter 4

Utilization of Space

1. Overview of Space Utilization.

Federal workspace is a costly resource that should be acquired, used, and managed in a manner that minimizes the amount needed to support Agency mission requirements and enhances its value. The efficient utilization of SBA occupied space is the joint responsibility of the Agency and GSA.

2. What is GSA's Responsibility for Space Utilization?

The GSA is responsible for ensuring efficient utilization of Government space and recapturing, for release or reassignment, any space that agencies do not justify as being required. To satisfy these responsibilities, GSA does the following.

- a. Monitors space utilization for all Federal agencies by conducting:
 - (1) Space Inspections. These are evaluations of the manner in which assignments are being utilized to determine whether a utilization survey is warranted.
 - (2) Space Utilization Surveys. In these surveys, recognized professional techniques are used to determine how efficiently the Agency is utilizing its work space, and to verify that space is being used in accordance with FPMR Part 101-17, "Assignment and Utilization of Space."
 - (3) Annual Census. A space census is performed annually to determine space efficiency. A computer printout is distributed for each Agency assignment by the GSA regional office. SBA must provide the peak number of personnel to be housed in the space during the fiscal year and verify other data included in the census report. For purposes of this census, personnel includes all permanent and temporary employees, work study participants, SCORE and other volunteers, and contractors housed in SBA-controlled space.
- b. Screens all requests for space against vacant available space to maximize the use of space in its inventory.
- c. Determines, in consultation with the Agency, whether requested space will be

satisfied through the reassignment of suitable vacant space before action is taken to acquire new space.

3. **What is SBA's Responsibility for Space Utilization?**

The SBA must cooperate with GSA in the assignment and utilization of space. The OAS will work closely with Headquarters and field offices and the appropriate GSA offices to facilitate this cooperation. The D/OAS is responsible for the following:

- a. Informing GSA regarding the use of assigned space;
- b. Providing all information requested by GSA as part of the annual space census;
- c. Furnishing data on personnel to GSA consistent with budget submissions to the Office of Management and Budget and with existing appropriations;
- d. Ensuring that the utilization rate of a space assignment is 125 square feet or less per person for primary office or people occupied space, and that support office space does not exceed 22 percent of the total primary office space;
- e. Continually studying and surveying space occupied to ensure efficient and economical utilization of office space consistent with the minimum amount required to perform the Agency mission; and
- f. Promptly reporting to GSA any space which is excess to their needs for assignment to other agencies.

4. **Can Existing Space Layouts in Field Offices be Modified?**

It is the responsibility of all field offices heads and Headquarters components to utilize existing space resources to the maximum efficiency possible. Prior to requesting additional space, field office heads should explore all feasible layout alternatives that could eliminate or lessen the requirement for additional space. A layout change may be justified due to a reorganization, staffing increase or decrease, or for other management or administrative considerations.

- a. Space Planning. If the field office head determines that space planning assistance is required, he or she must submit a request, in writing, to the D/OAS. If the request is approved, OAS has the following options available to provide space planning:

- (1) Request space planning from appropriate GSA regional office on a reimbursable basis;
 - (2) Procure space planning services directly from the private sector (this option is only available if GSA is unable to provide the services requested); or
 - (3) Assign an OAS staff member to work with the field office.
- b. Space Programming. The OAS is responsible for the development of a space program for all layout modifications in field offices. The space program must consist of an SF 81, SF 81A, Space Requirements Development Guidelines and Questionnaire, and any other information required to ensure a functional space layout.
- c. Reimbursable Work Authorization (RWA). All construction work generated by space layout modifications must be submitted to GSA on GSA 2957. The GSA 2957 describes the work to be performed and must be signed by the AA/A. Signature on this form certifies a valid obligation to GSA and that funds for the specified work are available for that purpose.

5. **Can Existing Space Layouts in Headquarters Be Modified?**

The D/OAS has overall responsibility for efficient space usage in the Headquarters. Each office director, however, is responsible for ensuring that the space assigned to that office is used to the maximum efficiency possible.

- a. Layout changes may be required in the Headquarters for the following reasons:
- (1) Reorganization, staffing changes, or other administrative and management reasons within an office that can be accommodated within the space presently assigned to the office; or
 - (2) Reorganization, staffing changes or other administrative and management reasons within an office that require either an increase in space or a different physical location, thus impacting on other organizational units.
- b. Office directors must contact the D/OAS, if space layout modifications may be required.

The D/OAS must be provided:

- (1) A detailed explanation of the reasons for a layout change;

- (2) An SBA Form 2, "Requisition for Supplies, Services and Federal Assistance;" and
 - (3) Any other information required by the D/OAS to determine the extent of changes required.
- c. If additional space or a relocation within a building is required, OAS will develop options, ascertain the impact of proposed changes on other offices, and present to D/OAS and the directors of the other offices impacted for approval.
 - d. Space Planning: OAS is responsible for all space planning required within the Headquarters. OAS has the following options available for providing space planning services:
 - (1) Request space planning from GSA regional office;
 - (2) Procure planning services from a private sector contractor if services are not available through GSA; or
 - (3) Assign a staff member.
 - e. Space Programming: OAS is responsible for space programming required for space planning. Office directors must provide OAS with all requested information.

6. **What are the Procedures for Relinquishing Space?**

If the D/OAS or the office head determines that a surplus of space exists at the Headquarters, or any field office, the excess space must be relinquished using the following procedures.

- a. The D/OAS must notify the appropriate GSA regional office as soon as possible, but at least 120 calendar days before vacating, whenever space is no longer needed. Notification must be in writing, giving a description of the space and the estimated date of release.
- b. The space to be relinquished must be consolidated and readily assignable or marketable.
 - (1) The OAS will contact the GSA regional office to determine alteration requirements before initiating such alterations.
 - (2) Expenses required to alter the space to meet the above conditions must be

borne by SBA.

- c. SBA is responsible for space charges until the date of release specified in the notification, or until the date space is actually vacated, whichever occurs later. When timely notification has not been made to GSA, SBA is responsible for space charges for a period of 120 calendar days following the date of notification or until the space has been reassigned, whichever occurs first.
- d. When the space relinquished is "unique Agency space," SBA is also responsible for space charges for a period of 120 days following notification. Beyond 120 days, SBA is responsible for actual expenses incurred by GSA until one of the following occur:
 - (1) The space is assigned or otherwise disposed of by GSA; or
 - (2) The expiration of the term specified on the most recent SF 81 applicable to the space in question.
- e. If SBA commits to occupy space but never occupies that space, it is responsible for space charges for 120 days from the day that GSA is notified that the space is not required.
- f. When SBA is responsible for the operation, maintenance, and protection of Government-owned space assigned by GSA, and the Agency determines that this space is no longer needed, the SBA must notify GSA at least 6 months before relinquishing the space. The operation, maintenance, and protection of the space continues to be the responsibility of the Agency until the beginning of the next fiscal quarter, after the end of the 6-month period.

7. **Who Maintains SBA Space Assignment Records for Field Offices?**

Space assignment records are maintained by OAS to ensure maximum efficient utilization of each SBA property location within the region. Space records should consist of the following.

- a. Official documents concerning the space assignment which should be located on the left-hand side of the folder.
 - (1) Form A15. Copy of the assignment record from GSA.
 - (2) Building Lease. For assignments in non-Government owned buildings, a copy of the lease agreement between GSA and the building owner.

- (3) SF 81. Copy of the official SF 81's signed by the D/OAS that reflect the actual square footage assigned to the office.
 - (4) SF 81A. Parts 1 and 2. Copy of the forms submitted with the SF 81.
 - (5) Revised SF 81A. Parts 1 and 2. Copy of updated SF 81A worksheets that accurately reflect changes since submission of the space requirements package to GSA.
- b. Correspondence between the field, Headquarters, and GSA, and supporting documents concerning space assignments which should be located on the right-hand side of the assignment folder.
 - c. Floor plans that accurately reflect the current space layout of all assigned space. The set of plans should include partition locations, furniture layouts, telephone locations, and electrical locations.

Appendix 1**Index to Forms and Reports**

<u>Form</u>	<u>Paragraph</u>
SF 81, Request for Space	2-3
SF 81A, Space Requirements Worksheets,	2-3
SF 81A, Part 2, Standard Workspace Design	2-3
Space Requirements Development Guidelines and Questionnaire	2-3
GSA Form 2957, Reimbursable Work Authorization	3-29
SBA Form 2, Requisition for Supplies, Services and Federal Assistance	5b-2
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Appendix 2

Definitions

1. Acceptance of Space - The certification and commitment from an agency to occupy space. Based on Agency acceptance GSA may commit to the use of Government funds to award a lease, make a commitment for initial alterations, and/or establish a date of occupancy. The Agency is financially responsible for losses incurred by the Government caused by any failure to fulfill a commitment to accept space.
2. Acquisition of Work Space - The process of obtaining work space by purchase, lease, donation, exchange, eminent domain, construction, or any other means permissible by law.
3. Agency Controlled Space - Federally-owned, leased, or controlled space acquired or used by Federal agencies under any authority other than the Federal Property and Administrative Services Act of 1949, as amended. It also includes space for which authorization for acquisition, use, or disposal has been delegated to other agencies by GSA.
4. Central Business Area (CBA) - Area within the central city in a standard metropolitan statistical area (SMSA) or any non-SMSA that encompasses the community's principle business and commercial activities, and the immediate fringes thereof, as geographically defined in consultation with local officials.
5. Delineated Area The specific boundaries within which space will be obtained to satisfy an agency space requirement.
6. Excess Holdings - Any work space or related furnishings which are not essential to a Federal agency's existing or planned programs.
7. Federally-Owned Space - Work space, the title to which is vested, or will become vested pursuant to existing agreement, in the United States Government.
8. Federally-Leased Space - Work space for which the United States Government has a right of occupancy by virtue of having acquired a leasehold interest.
9. Federally-Controlled Space - Work space for which the United States Government has a right of occupancy by ownership, by lease, or by any other means, such as by contract, barter, license, easement, permit, requisition, or condemnation, whether or not paid for. This does not include space owned or leased by private sector entities performing work on Government contracts.

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10. General Purpose Space - Space which is determined by GSA to be suitable for the general use of agencies. General purpose space is categorized as office, storage, or special, dependent on the physical characteristics of the space.
11. GSA-Controlled Space - Space assigned to an agency by GSA by authority of the Federal Property and Administrative Services Act of 1949, as amended. It includes any space for which an agency pays GSA directly.
12. Initial Space Layout - The specific placement of workstations, furniture, and equipment for new space assignments. These initial services are provided by GSA at no cost to the agencies, upon agency request.
13. Inventory - A summary, survey, or itemized list of the space, assets, or materials under the control of a Federal agency.
14. Joint Use Space - Occupiable space, such as cafeteria, conference rooms, credit unions, snack bars, and certain physical fitness and child care centers, which is available for common use by personnel of any Federal agency.
15. Gross Square Footage - All floor area (including all openings in floor slabs) measured to the outer surfaces of exterior or enclosing walls, and includes all floors, mezzanines, halls, vestibules, stairwells, service and equipment space with sloping ceilings (such as attic space) having 5 feet or more headroom, and appended covered shipping or receiving platforms at truck or railroad car height. Also included in gross floor area, but calculated on one-half of actual floor area, are covered open porches, passages and walks, with appended uncovered receiving and shipping platforms at truck or railroad car height.
16. Net Usable Space - The area to be leased for occupancy by personnel and/or equipment. It is determined by:
 - a. Computing the inside gross area of the space by measuring from the normal inside finish of exterior walls, or the room side finish of fixed corridor and shaft walls, or the center of tenant separating partitions;
 - b. Making no deductions for the columns and projections enclosing the structural elements of the building;
 - c. Deducting from the gross area toilets and lounges; stairwells; elevators and

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escalator shafts; building equipment and service areas; entrance and elevator lobbies; stacks and shafts; and fully enclosed convectors when the housing rests on the floor and each end abuts a column or wall; and

- d. Deducting from the gross area corridors in place. If the building's corridor system does not provide ready access to all rooms required, a deduction for corridors will be made in an amount equal to 10 percent of the remaining gross area after deducting items in letter (c) above. The area of corridors within the gross area would apply against the 10 percent factor.
17. Occupiable Area - That portion of the gross area which is available for use by an occupant's personnel or furnishings including space which is available jointly to the various occupants of the buildings, such as auditoriums, health units, and snack bars.
 - a. Occupiable area does not include that space in the building which is devoted to its operations and maintenance, including craft shops, gear rooms, and building supply and issue rooms.
 - b. Ceiling-high corridors solely serving a single space assignment are occupiable.
 - c. Occupiable area is computed by measuring from the occupant's side of ceiling high corridor partitions or partitions enclosing mechanical, toilet, and/or custodial space to the inside finish of permanent exterior building walls or to the face of the convector if the convector occupies at least 50 percent of the length of the exterior wall. When computing occupiable area separated by partitions, measurements are taken from the center line of the partitions.
 18. Office Support Area - All supplemental workstations and those specific and discreet areas constructed as office space and used to meet mission needs outside the Agency's requirements for housing personnel, such as public oriented or centralized reception, hearing or meeting facilities, service, inspection, distribution, storage or processing activities. Such space is most cost-effectively collocated with normal office space.
 19. Office Support Area Allowance - The percentage of space, over and above the primary office or people-occupied area requirement, allocated for office support functions. The office support area allowance is based on professional practices and may be up to 22 percent of the amount of the primary office space.
 20. Primary Office Area - The primary people-occupied area in which an activity's normal

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operational functions are performed.

21. Primary Office Area Utilization Rate - An indicator of the efficiency with which the primary office space is used. It is calculated by dividing the total occupiable primary office area square footage by the total number of persons in that area.
22. Personnel - The peak number of persons to be housed during a single 8-hour shift, regardless of how many workstations are provided for them. In addition to employees of the Agency, personnel includes temporaries, part-time, seasonal, and contractual employees and budgeted vacancies. Employees of other agencies who are housed in the space assignment are also included in the personnel total.
23. Request for Space - A written document upon which an agency provides GSA with the information necessary to assign space. A space request shall be submitted on SF 81 and SF 81A, and Space Requirements Development Guidelines and Questionnaire.
24. Secondary/Shared Workstations - Nondedicated workstations used more than 50 percent of the time by two or more persons occupying a space assignment during an 8-hour shift. They function in support of the occupant agency's mission and are housed outside the primary people occupied workstations.
25. Space Assignment - An administrative action by GSA which authorizes the occupancy and use of space by a Federal agency or other eligible entity.
26. Space Inspection - A reconnaissance-type evaluation by GSA of the manner in which assignments are being utilized to determine whether a utilization survey is warranted.
27. Space Planning - The process of using recognized professional techniques of space programming, planning, layout and interior design to determine the best location and the most efficient configuration for agency facilities.
28. Space Requirements Program - The statement of an Agency's space needs as expressed on SF 81A, Space Requirements Worksheet, Space Requirements Development Guidelines and Questionnaire, and additional supporting documentation such as adjacency diagrams, and summarized on SF 81, Request for Space.
29. Space Utilization Survey - The process of employing recognized professional techniques to determine how efficiently an agency is utilizing its work space, and to verify that space is being used in accordance with the Federal Property Management Regulations.

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30. Special Purpose Space - Work space which is predominantly utilized for the special purpose of an agency and is not generally suitable for the use of other agencies.
31. Standard Alterations (SAs) - Those alterations necessary to prepare an Agency's space to meet a particular classification, that is, office, storage, or special, and permit occupancy of the space.
32. Unique Agency Space - General purpose space which either consists of more than 50 percent special-type space not likely to be needed by another agency, or space of any type located in an area where it would be impractical to house another agency.
33. Work Space - Federally-controlled space in buildings and structures (permanent, semipermanent, or temporary) which provides an acceptable environment for the performance of Agency mission requirements by employees or by other persons occupying it. Work space is further classified as:
 - a. Office space which provides an environment suitable in its present state for an office operation;
 - b. Storage space which generally consists of concrete, wood block, or unfinished floors; bare block or brick interior walls; unfinished ceilings; and similar construction containing minimal lighting and heating; and
 - c. Special space which has unique architectural features, requires installation of special equipment or requires verifying sums to construct, maintain and/or operate as compared to office and storage space.
34. Workstation - A location within an office space assignment that provides a working area for one or more persons during a single 8-hour shift. Secondary or shared workstations are part of the office support area.

Appendix 3
(Paragraph 2-3)
Sample Standard Form 81, Request for Space

REQUEST FOR SPACE (See instructions on reverse)		1. DATE	2. AGENCY REQUEST NUMBER	3. LOCAL AGENCY CONTACT (Name)	PHONE NO.	4. AGENCY MARKET SURVEY REPRESENTATIVE (Name)	PHONE NO.
5. TO: GENERAL SERVICES ADMINISTRATION PUBLIC BUILDINGS SERVICE		6. FROM: AGENCY NO., STREET CITY & STATE ZIP CODE		7. FOR: AGENCY ADDRESS ZIP CODE BUREAU CODE			
8. TYPE OF REQUEST <input type="checkbox"/> INITIAL <input type="checkbox"/> CONTINUING REQUIREMENTS <input type="checkbox"/> EXPANSION <input type="checkbox"/> REDUCTION		9a. GEOGRAPHIC SERVICE AREA		9b. DELINEATED AREA			
10. TERM OF OCCUPANCY FROM (mo. & yr.) TO (mo. & yr.)		NO. OF YEARS FIRM TERM		11. TOTAL NO. OF PERSONNEL TO BE HOUSED			
12. SPACE REQUIREMENTS					13. SPECIAL REQUIREMENTS AND SERVICES (see attached)		
O F F I C E	TYPE OF SPACE	NO. OF PERSONNEL	SQ. FT. PER PERSON	SQ. FT.	<input type="checkbox"/> ATTACHMENT(S) 14. AGENCY CERTIFICATION I certify that this request is accurate and complete; is for the minimum amount of space required; is in compliance with FPMR 101-17, including all laws and executive orders governing the location of space; and that funds are available for payment of rent, moving expenses, telecommunication expenses, and any related reimbursable costs. SIGNATURE _____ PHONE NO. _____ DATE _____ PRINT NAME AND TITLE _____		
	a. PRIMARY OFFICE AREA						
	OFFICE SUPPORT AREA						
	OFFICE SPACE SUBTOTAL						
S T O R A G E	b. ST 1 GENERAL STORAGE				15. FOR GSA USE ONLY (Action by Authorized GSA Official) <input type="checkbox"/> GOV'T CONTROLLED SPACE TO BE ASSIGNED <input type="checkbox"/> NO GOV'T SPACE AVAILABLE LEASING ACTION PLANNED <input type="checkbox"/> UNIQUE AGENCY SPACE DETERMINED - SEE ATTACHED <input type="checkbox"/> AGENCY AUTHORIZED TO ACQUIRE SPACE UNDER ITS OWN AUTHORITY <input type="checkbox"/> COMMENTS ATTACHED		
	c. ST 3 WAREHOUSE STORAGE						
	d. STORAGE SUBTOTAL (Lines b, c)						
S P E C I A L	e. SP 1 LABORATORY & CLINIC				SIGNATURE OF AUTHORIZED GSA OFFICIAL _____ PRINT NAME AND TITLE _____ SPACE REQUEST NO. _____ DATE RECEIVED _____ NAME OF GSA REGIONAL CONTACT _____ PHONE NO. _____		
	f. SP 2 FOOD SERVICE AREA						
	g. SP 3 STRUCTURALLY CHANGED						
	h. SP 4 AUTOMATED DATA PROCESSING						
	i. SP 5 CONFERENCE & TRAINING						
	j. SP 6 LIGHT INDUSTRIAL						
	k. SP 7 QUARTERS/RESIDENTIAL HOUSING						
	l. SPECIAL SUBTOTAL (Lines e-k)						
m. TOTAL SPACE REQUIRED (Lines a, d, & l)							
n. OPEN LAND (Total acres)							
o. ST 2 INSIDE PARKING (No. of spaces)							
p. OUTSIDE PARKING (No. of spaces)							
q. TOTAL PARKING SPACES (Lines o, p)							

Previous edition not usable.

This form was electronically produced by Elite Federal Forms, Inc.

STANDARD FORM 81 (REV. 2-89)
 Prescribed by GSA - FPMR (41 CFR) 101-17

Appendix 3, con't
Instructions for Standard Form 81, "Request for Space"

The Standard Form 81 (SF 81) is required by GSA as part of the space procurement process. Revised in 1989, the new SF 81 is a summary document that presents a compilation of the information contained on the SF 81A. "Space Requirements Worksheets," and the "Space Requirements Development Guidelines and Questionnaire." The instructions in this appendix supplement the instructions on the reverse side of the revised SF 81. The number headings in these instructions correspond to the box numbers on the form.

1. Insert the date that the request was originated.
2. Insert the space control number provided by OAS as the agency request number.
3. Insert the name and telephone number of the SBA employee who will serve as the primary contact with GSA.
4. Insert the name and telephone number of the market survey representative for the SBA. This person should have the authority to represent the Agency in discussions with GSA during the market survey phase of space procurement.
5. Insert the address of GSA, Public Building Service (PBS), in the region the space is requested for.
6. Provide the address of SBA Headquarters.
7. List the region, district, branch, etc., office to occupy the space and provide the present address.
8. Check the appropriate box to indicate whether the request is for new space (initial request); continuing space requirements with no changes; expansion of existing space; or reduction of existing space.
- 9a. Provide the geographic service area for the office requesting the space. If there is no geographic service area, so state.
- 9b. Provide the delineated area for the office requesting the space. The delineated area should be clearly defined and must be explained and justified in an attachment to the SF 81.

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10. Give the desired month and year for initial occupancy of the space and the date to which the space is required (typically 10 years).
11. Provide the total number of personnel to be housed in the space. This includes all full-time and part-time permanent or temporary employees, stay-in-school workers, interns, and volunteers, including SCORE volunteers.
12. The space requirements box requests information concerning the amount of space requested for office-type, storage, and special space.
 - a. Office Type Space. This section requests a breakdown of space requirements for all space classified as office type.
 - (1) Primary Office Area - Provide the total number of personnel to be housed in the space, the square footage per person requested, and the total number of square feet required for primary office space. These totals summarize information compiled on the SF 81As.
 - (2) Office Support Area - List the square footage required for office support functions. This category should not exceed 22 percent of the primary office area. The total shown should equal the sum of the square footages indicated on the SF 81As for office support areas.





























Office Space Subtotal - This equals the sum of the square footage required for primary office area and office support area.
 - b. Storage Space. This section requests a breakdown of square footage requirements for all space classified as storage space. This includes general storage (ST-1) and warehouse storage (ST3).
 - (1) Line B, General Storage - Enter the total square footage needed as summarized from SF 81A entries.
 - (2) Line C, Warehouse Storage - Provide the total square footage required for warehouse space.
 - (3) Line D. Subtotal - This line subtotals the entries for lines B (general storage) and C (warehouse storage).

Appendix 3, con't

- c. Special Space. This section requests the space requirements for all special spaces which include: laboratory and clinic areas (SP-1); food service areas (SP-2); structurally changed areas (SP-3); automatic data processing areas (SP-4); conference-training areas (SP-5); light industrial areas (SP-6); and, quarters and residential housing areas (SP-7). For lines E through L provide the total square footage required by category per the SF 81A.
13. All special requirements and/or remarks pertaining to the request for space should be explained in sufficient detail to justify the request to the satisfaction of GSA. Items that are typically explained in box 13 include, but are not limited to, the following:
- a. Breakdown of office type space requirements other than workstations (line 13). This includes the square footage requirements and any above-standard alterations required in the space.
 - b. Breakdown of general storage and warehouse area space requirements and a description of the above-standard alterations necessary to meet the needs of the Agency.
 - c. Itemization of special spaces by type and a detailed explanation of the above-standard alterations required.
 - d. Explanation of extended operational requirements.
14. The certification block should be prepared for the signature of the Director, OAS.

[illegible]

Appendix 4, Con't SBA Form 81A

SECTION 1		INSTRUCTION, STANDARDS AND SYMBOLS						
DESKS		Standard Desk 60x30	TABLES		Table, Conference 72x36	MISCELLANEOUS		Storage Cabinet 2-Door 36x18 (12)
		Typist Desk 60x34 w/Left or Right Typing Bed			Standard Table 60x34			Steel Shelving 36x18 (10)
		Unitized Desk 60x30 w/Left or Right L-unit Return 36x18			Table, Medium 45x34			Library Shelving 36x15
		Conference Desk 72x36			Table, Small 36x24			Drawing Boards DB-5 60x40 DB-6 72x45 S = Stool
		File, Letter 15x28 (7)			Modular Table Unit 66x18			Map Cabinet 54x42
		File, Legal 18x28 (8)			Table, Round 54"			Costumer 12-Hanger 51x20 (14)
		Lateral File 36x18 (9)			Table, Round 42"			Costumer 6-Hanger 30x20 (8)
		Bookcase 34x14 (6)			Table, Round 36"			Credenza 60x10
		Divan or Sofa 72x40			Table, Host 42x18		SPACE TYPE SYMBOLS: O Open Area P Private Area SP Semi-Private Area ENCLOSURE TYPE SYMBOLS: CH Ceiling-High Partition PS Privacy Screen O Open	
		Guest Chair Lounge Chair			Table, End 18x24			
SECTION 2		PROGRAMMING INSTRUCTIONS						
<p>(1) Organize the data supporting your request by functional work groups. When one work group has been described begin the next work group on a new page.</p> <p>(2) The requesting agency is responsible for describing the following workspace elements of the <i>Space Requirements Program</i>.</p> <ul style="list-style-type: none"> • Workstations are indicated by employee name, functional title and grade for each <i>authorized and budgeted</i> position. <i>If the authorized position is vacant, so indicate.</i> Square feet required are determined by layout design on SF-81A, Part 2. • Common Function spaces are indicated by the appropriate name of the workspace (conference, reception, etc.) and the symbol C/F in the grade column. Square feet required are determined by layout design on SF-81A, Part 2. • Administrative Support spaces are either <i>centralized files</i> or miscellaneous equipment (i.e., costumers, an extra bookcase) not appropriately contained within other workspaces. Indicate A/S in the grade column. Square feet required may be determined by multiples of the allowance indicated in () in Section 1 above. <p>(3) Develop the space requirements program in the following manner:</p> <p>Step 1: List all workspace elements described in (2) above in an order determined by adjacency.</p> <p>Step 2: As necessary, prepare a standard workspace design on SF-81A, Part 2 for each workstation or common function workspace element. Indicate the dimensions of the workspace and calculate the square feet required.</p> <p>Step 3: Use the symbols shown within the illustrations above in Section 1 to itemize furnishings and equipment on SF-81A. DO NOT LIST EXCESS. Itemized listings need not be shown for line items previously standardized. Simply code the line entry appropriately.</p> <p>Step 4: Complete the line item entry by indicating space and enclosure type, square feet required and workspace code No.</p> <p>(4) Describe, in <i>Remarks</i>, all special needs such as: weight of heavy items, special utilities, service access requirements, supplemental HVAC, etc. Develop a separate specification sheet if necessary.</p> <p>(5) The information provided on these worksheets is to be summarized on SF-81, Request for Space, and submitted attached thereto.</p>								

Appendix 4, con't
Instructions for SF 81A, Space Requirements Worksheet

Standard Form 81A (SF 81A) describes the workstation, common function, and administrative support workspace elements of the Agency's space requirements program. The information provided on the SF 81A should be summarized on SF 81 and attached thereto. The following instructions highlight the programming instructions found on the reverse side of the SF 81A and supplement those instructions.

1. Data should be organized by functional work groups. When one work group has been described, the next work group should begin a new page.
2. Within a functional work group, workstations, common function spaces, and administrative support spaces should be listed in order determined by adjacency relationships.
3. For workstation line items enter employee name, functional title and grade for each authorized and budgeted position. If the authorized position is vacant, so indicate.
4. For common function space line items enter the appropriate name of the workspace (conference, reception, etc.) and the symbol C/F in the grade column.
5. For administrative support space line items enter the name of the workspace and indicate A/S in the grade column. Administrative support spaces consist of either centralized files or miscellaneous equipment, such as costumers or a bookcase, not appropriately housed within other workspaces.
6. For each line item itemize furnishings and equipment using the symbols illustrated on the SF 81A.
7. As necessary, prepare a standard workspace design on SF 81A, Part 2, for each workstation or common function workspace element, indicating the dimensions of the workspace and calculating the square footage required. The standard workspace designs should represent the functionally required furniture, equipment and square footage; they should not be illustrations of existing workspaces unless such workspaces efficiently satisfy functional requirements.
8. Complete each line item entry by indicating space and enclosure type, square feet required (as determined by the SF 81A, Part 2) and workspace code number. In the section entitled "Remarks" describe all special needs. These may include such items as

Appendix 4, con't

weight of heavy items, special utilities, service access requirements, supplemental HVAC, etc. Separate specification sheets should be included where substantial requirements exist. These may be accompanied by copies of manufacturer specification sheets if appropriate.

Appendix 5
(Paragraph 2-3)
Sample Standard Form 81A Part 2, Standard Workspace Design

STANDARD WORKSPACE DESIGN NO. 													
WORKSPACE DESCRIPTION ▼	GRADE	SPACE TYPE	ENCLOSURE	SQUARE FEET	DESKS	CREDENZAS	CHAIRS	TABLES	FILES	BC	ST	SS OR LS	MISC.
WORKSPACE DESIGN: (SCALE 1/4" = 1'0")													

STANDARD FORM 81-A PART 2 (10-83)

Appendix 6
(Paragraph 2-3)

Sample Space Requirements Development Guidelines and Questionnaire

A Space Requirements Development Guidelines and Questionnaire package is required by GSA as part of the space request process. The worksheets in the form of a questionnaire provide supplemental information to the SF 81A and provide the requesting SBA office with an opportunity to explain in detail the requirements necessary in the requested space. The SBA offices should complete the worksheets in consultation with OAS and the appropriate GSA regional office to ensure that the information provided is accurate and complete.

Appendix 6, con't
Space Specification
Attachment to Standard Request for Space (SF 81)

SECTION I INTRODUCTION

Agency/Bureau: _____

Location Requested: _____ (City/State) _____

Delineated area (in smaller towns this will normally be city wide. In larger cities it will normally be the central business area (CBA) unless you have a requirement otherwise. If other than city wide or CBA outline delineated area by streets and provide justification).

SECTION II. SPACE REQUIREMENTS

Date required: _____

Maximum firm term of lease: () 3 years () 6 years () other (specify)

(This is the noncancelable lease term based on the agency's best knowledge of continuing needs. Normally, alterations for agencies cannot be amortized in less than three (3) years). Temporary space (less than one year) will be occupied as is or agency will be expected to fund improvements.

Appendix 6, con't

Number of occupants

Occupiable square feet

<u>Male*</u>	<u>Female*</u>	<u>Office</u>	<u>Storage**</u>	<u>Special</u>	<u>Total</u>
--------------	----------------	---------------	------------------	----------------	--------------

* Needed to determine toilet facility requirements.

** "Storage" means non-airconditioned space with low lighting level and no carpet. A room for office forms or related items that is finished as office is classified as office. Special means laboratories, computer rooms, large conference rooms or other construction requiring special features.

Note: many of the items described in this form are above standard reimbursable. Check with your GSA representative to determine which are extra cost.

Is there a seasonal peak staffing level? () Yes () No

Approximate maximum number _____

Is there a second or third shift? () Yes () No

If yes, please identify the number of employees on each shift: _____

Will multiple occupancy work stations be used? () Yes () No

SECTION III. LOCATION CONSIDERATION

Must your space be on contiguous floors? () Yes () No

If yes, please explain on a separate sheet.

Must your space be located on one floor only? () Yes () No

If yes, please explain on a separate sheet.

Must you be located on a particular floor? () Yes () No

If yes, please explain on a separate sheet.

Must your space be located in one contiguous block without being split by a corridor?

() Yes () No if yes, please explain:

Appendix 6, con't

Maximum or minimum floor size? _____

Identify any other agencies which you must be located near and explain why:

Identify any agencies you should not be located near and explain why:

SECTION IV. STRUCTURAL REQUIREMENTS

Will you have a ceiling height requirement in excess of 8 feet? () Yes () No

If yes, please explain: _____

Will you have an unusual floor load requirement, such as power files, safe, central file rooms or libraries? () Yes () No

If yes, explain. List equipment to be housed. (Weight and size)

SECTION V. TRANSPORTATION

How many parking spaces will be required for official use vehicles? (Parking for employees is not authorized except as required by local codes). _____

Is Bus service required? () Yes () No

If yes, how close to nearest bus stop? _____

Will a loading dock be required? () Yes () No

What size trucks will it have to accommodate? _____

Appendix 6, con't

Will it have to be enclosed? () Yes () No

Will a freight elevator be required? () Yes () No

Briefly describe warehousing operation requiring loading dock & freight elevator.

SECTION VI. ARCHITECTURAL**Partitioning**

List the rooms you expect to need in the space below with remaining open area the last line item. Be sure that the total square footage including the open area, matches the total square footage listed under the space requirements section. (If additional space is required, please use this format on a separate sheet). Partition height will be slab to slab (s/s), ceiling high (c/h), 6' high or acoustical screens (a/s).

No. Of Area Rooms of Each	Total Sq. Ft.	Partition Height	Intended Use	Intended Stc

Partitions: Sound Conditioning

This means walls constructed to reduce or prevent the transmission of normal office should have an stc (sound transmission coefficient) of 37. A conference or hearing room will require an stc of 40 to 45. In rare instances where discussions occur which could have harmful effects on the government if overheard, an stc of 50 may be required. Requirements for stick-on acoustical wall tiles, acoustical panels or other requirements to reduce noise level within a room should be listed on a separate sheets.

Partitions: Folding

If a folding wall will be required, please provide information on size, use, and stc on separate

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sheet.

Floor Covering

Standard floor covering for office space is carpet. If something else, such as vinyl tile is required for a storage or file room, outline the requirements here:

Window Treatment

Standard window treatment is either lined drapes or thin slat blinds. List your preference here:

SECTION VII. MECHANICAL, ELECTRICAL, PLUMBING**Laboratory**

If Laboratory space is required, please attach requirements on separate sheets.

Plumbing

If sink or other plumbing is required, please list here:

Electricity/Telephones

Number of standard duplex electric outlets required: _____

Number of telephone outlets required: _____

Special electrical requirement (other than computer - include special requirement for photocopiers, remote computer terminals, etc. Include information on voltage, amperage, cycle phase, if separate or isolated circuit type of ground (if special) special, outlet requirements or any other requirements. Also include information on BTU's of heat generated by equipment:

Appendix 6, con't

SECTION VIII. SERVICES AND UTILITIES

Do you have a requirement for a flag pole? () Yes () No

If yes, please explain:

What are your normal hours of operation? _____

Will overtime access and utilities be required? () Yes () No

If yes what frequency? _____

SELECTION IX. FIRESAFETY

Do you have any special firesafety requirements? () Yes () No

If yes, outline below or if more room is needed, on a separate sheet:

SECTION X. SECURITY REQUIREMENTS

List special security requirements (if any) such as location within building, slab to slab walls, vaults, special guard requirements, special locks, internal locks, alarm systems, etc:

Appendix 6, con't**SECTION XI. COMPUTER ROOM**

Will you require a computer room? () Yes () No

If no, proceed with Section XII. If yes, approximately what size (square feet)?

Will the computer room require a raised floor? () Yes () No

What live load should the floor support (pounds per square foot)? _____

What are the maximum and minimum temperatures allowed in the computer room?

Maximum _____ Minimum _____

What are the maximum and minimum humidity ranges in the room?

Maximum _____ Minimum _____

Will these environmental conditions have to be maintained 24 hours a day? () Yes () No

Will any equipment be cooled from an underfloor system? () Yes () No

Please list each piece of equipment to be located in the computer room along with the operating btu's of heat output and complete electrical requirements of each item. Electrical information should include the following: voltage; amperage; phase; grounding requirements, if separate or isolated circuit; hard wired or plug in. List in tale form on separate sheet.

Where equipment will plug in to a wall outlet (or floor outlet), please tell us if the computer equipment vendor, your agency or GSA is to furnish the outlets.

Where GSA will furnish, please provide complete specifications of electrical outlets, including catalog numbers:

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Will you require a portable power center? () Yes () No

Who will furnish signal cable to interconnect computer equipment? _____

If furnished by GSA, please provide complete specifications and quantities, and let us know if cable can be spliced?

Who will hook up computer cable? _____

Who will plug in or hard wire the computer equipment?

Will cable runs to remote terminals be required? () Yes () No

Will an emergency power supply be required? () Yes () No

If yes, please describe: _____

Will an uninterruptible power supply be required? () Yes () No

If yes, please describe: _____

Will you require any convenience type electrical outlets in the computer room for test equipment?

() Yes () No

Will this room require a telephone outlet or special telephone line? () Yes () No

Appendix 6, con't

How many people will normally be present in the computer room? _____

SECTION XII. SPECIAL REQUIREMENTS

Do you have a requirement for interior view windows? () Yes () No

If yes, list number, size and distance from bottom edge to floor _____

Will you have a requirement for a public address system? () Yes () No

If yes, please describe with full justification:

If you have a conference room, will you require any of the following:

Exhaust Fan () Yes () No

Chalk Boards () Yes () No

Liquid Chalk Boards () Yes () No

Built-In Screens () Yes () No

Projection Booth () Yes () No

Stage () Yes () No

Blackout Drapes () Yes () No

What is the average number of people expected to attend meetings? _____

List any other special requirement not already covered:

By (signature) _____

Authorizing Official

Date

Appendix 7
(Paragraph 3-31)
Space Classifications and Standard Alterations

1. How is Office Space Classified?

Office space is space which provides a suitable environment, in its present state, for an office operation, and which includes, among other features, adequate lighting, heating and ventilation, floor covering, finished walls, and accessibility. The following represents uses of office space:

- a. General purpose office space;
- b. Private corridors;
- c. Meeting rooms without special equipment and additional heating, ventilation, and air-conditioning (HVAC);
- d. Training rooms without special equipment and HVAC;
- e. Libraries without extensive built-in stacks and special floor loading,
- f. Dry laboratories;
- g. Storage in office space;
- h. Credit unions without fixed equipment;
- i. Lounges other than toilet areas;
- j. Reception areas;
- k. Hearing rooms without special equipment and HVAC;
- l. Mail rooms;
- m. Health rooms without special equipment;
- n. Table areas in a cafeteria without supplementary HVAC or other special features;

Appendix 7, con't

- o. File areas without increased floorload;
- p. Wellness/physical fitness facilities finished to office standards;
- q. Child care facilities except toilets; and
- r. Judiciary chambers and jury rooms authorized prior to fiscal year 1992.

2. What Alterations Can I Make to Office Space?

- a. Standard Alterations (SAs). SAs are those alterations necessary to prepare space to meet the basic requirements for the particular classification of space. For office space, the standard level alterations are the following.
 - (1) Floors. Either resilient flooring or carpeting of a grade and type specified in the standard solicitation for offers (SFO) or by the most recent Federal Supply Service (FSS) standard commercial grade carpet schedule purchases.
 - (2) Ceilings. Must be structurally sound, and be at least 8'0" and no more than 11' 0" clear from finished floor to the lowest obstruction. Ceilings shall have a sound transmission coefficient (STC) rating of 40.
 - (3) Partitions. New and/or existing ceiling high interior partitions shall be provided to a maximum of one linear foot for each 10 square feet of occupiable office type space. Walls shall have a minimum STC rating of 40.
 - (4) Wall Treatment. Paint or vinyl wall covering as is the building standard. Vinyl will not be less than 13 oz. per square yard. All walls in the office area must have Government approved wood, rubber, vinyl, or carpet base, as part of the initial tenant buildout.
 - (5) Window Treatment. Either blinds or drapes of a type and quality specified in the standard SFO or most recent FSS specifications.
 - (6) Heating, Ventilation, and Air-Conditioning (HVAC). The HVAC system capable of maintaining an acceptable operating environment. The HVAC must provide a comfortable environment for a personnel density of up to

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the equivalent of 1 person per 135 square feet of occupiable space.

- (7) Lighting. Lighting must be provided at a minimum of 50-foot candles at every work surface.
- (8) Electrical Outlets. Electrical outlets will be provided to a maximum of two duplex and/or one quadruplex electrical outlet for each 100 square feet, or in the case of systems furniture, 1 base feed for every 100 square feet of occupiable office type space. Workstation outlets shall be wired so that no more than four workstations are on a 20 AMP circuit. Convenience outlets (outlets mounted on columns or permanent walls or in private offices, conference rooms, libraries or file/supply rooms) shall be wired to accommodate no more than 8 receptacles to one 20 AMP circuit. Special copier or printer outlets shall be provided at the rate of 1 outlet for every 10,000 square feet.
- (9) Telecommunications Requirements. Conduits and ducts will be provided for tenant agencies telecommunications based on a standard planning assumption of one telephone and one data instrument for every 100 square feet of occupiable office space. In those building areas where the utilization rate is less than 100 square feet of occupiable office space, that lesser rate will be standard. Any requirements above this level are above-standard and are to be reimbursed to GSA.
- (10) Computer LAN System Cable Installation. Conduit and/or raceway to accommodate LAN cable installation on a floor or between floors shall be installed as part of the standard tenant buildout. All LAN cable must be purchased by the tenant Agency (SBA) and furnished to a lessor or a contractor for installation (lessor or contractor will specify amount of cable required based on Government layouts). Installation instructions and diagrams must be provided by the tenant Agency (SBA) or its computer vendor to the lessor or contractor along with the approved space (design intent) layout. Cable installation shall be done by the lessor or contractor with the assistance and/or advice of the tenant Agency's (SBA's) personnel or computer vendor. The computer vendor must be hired and funded by the tenant Agency (SBA). Cable installation (except installation of connectors for the machines) will be done as a part of the standard tenant buildout.

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- b. Typical Above-Standard Alterations (ASA). ASAs are alterations that exceed what is required for the space classification. They must be justified by the Agency (SBA) to GSA and are provided on a reimbursable basis. Typical ASAs for office space include the following.
- (1) Folding Partitions. Includes the partition and the structural support work required to support it.
 - (2) Non-standard Lighting. Includes decorative lights, spot lights, etc. Parabolic light fixtures shall be considered as standard lighting if they are installed as a standard feature of a building.
 - (3) Observation Windows. Includes interior windows in private offices and side light glass panels installed for decorative purposes.
 - (4) Dutch Doors. Agency to pay the difference in cost between a standard door and a dutch door.
 - (5) Glass Pass-Through Windows. Installed in Agency office space.
 - (6) Glass Doors or Double Doors. Does not include main (central) reception doors or doors to large supply or forms areas where shipments come in from dock areas.
 - (7) Digital Security Locks, and Magnetic (Card Key or Kastle System) Locks.
 - (8) STC Ratings Greater than 40 in Walls and Ceilings.
 - (9) Alarm Systems. If not required by GSA risk assessment.
 - (10) Single Electrical Outlets. On one 20 AMP circuit, unless specified as standard alterations in an approved GSA, agency space allocation standard.
 - (11) Sound Masking.
 - (12) Interior Door Locks. Standard office doors shall have passage set hardware. Conference and supply rooms may have locks.

Appendix 7, con't**3. How is Storage Space Classified?**

Storage space is space that is not finished to the level of office quality. It is classified as either general storage area, inside parking area, or warehouse

- a. General storage areas (ST-1) include storage in general purpose buildings generally consisting of unfinished floors, walls, and ceilings, and adequate HVAC and lighting. General storage areas include:
 - (1) Basements;
 - (2) Attics;
 - (3) Supply rooms not finished to office standards;
 - (4) Store rooms not finished to office standards; and
 - (5) File rooms not finished to office standards.
- b. Inside parking (ST-2) includes the following:
 - (1) Garages;
 - (2) Parking areas (including rooftops and decks); and
 - (3) Motor pool parking.
- c. Warehouse areas (ST-3) are spaces specifically designed for materials storage and handling operations. Warehouse space consists of features which include, but are not limited to, concrete or wood block floors, unfinished ceiling, heavy live-floor-load capacity (over 200 pounds psf), high ceilings (over 14 feet), and industrial lighting.

4. What Alterations Can I Make to Storage Space?

- a. Standard Alterations.
 - (1) General storage areas are as follows.

Appendix 7, con't

- (a) Floors. Floors will be sealed concrete, wood block, or other material adequate for general storage.
 - (b) Ceilings. Ceilings will be unfinished.
 - (c) Partitioning. No additional partitioning or wall finish will be provided except for required fire walls and Agency separating partitions. Door openings shall be wide enough to allow the passage of hand trucks. Doors and jambs shall be installed with protective plates to prevent damage.
 - (d) Heating, Ventilation, and Air-Conditioning. HVAC will be provided that is capable of maintaining an operating environment with a temperature between 65 and 85 degrees Fahrenheit.
 - (e) Lighting. Sufficient lighting will be provided to maintain a minimum of 50-foot candles.
2. Inside parking is:
- (a) Adequate identification of parking areas.
3. Warehouse areas are the following:
- (a) Floors. Floors will be sealed concrete, wood block, or other material adequate for warehousing services.
 - (b) Ceilings. Ceilings will be unfinished.
 - (c) Partitioning. No additional partitioning or wall finish will be provided except required fire walls and Agency separation partitions.
 - (d) Heating, Ventilation, and Air-Conditioning. Service will be provided that can supply a minimum temperature of 55 degrees Fahrenheit.
 - (e) Lighting. Lighting to maintain a minimum of 10-foot candles will be provided.

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- (f) Toilet Facilities. Facilities will be provided on a case-by-case basis.
 - (g) Electrical Service. Service will be supplied as required, and including normal hookup to Agency warehousing.
 - (h) Telephone Outlets. One outlet will be provided.
 - (i) Existing Building Features. Features, such as covered loading docks, power operated doors, dock-levelers, and railroad sidings available for use will be provided when justified by the Agency and approved by GSA.
- b. Typical Above-Standard Alterations (ASA):
- (1) Typical ASAs for general storage areas include:
 - (a) Dead bolt locks on interior room doors.
 - (b) Interior Security/Safe Partitioning. Subdivision of tenant areas by wire mesh partition is adequate when security is not a major consideration.
 - (c) Lighting above 50-foot candles.
 - (2) Typical ASA's for warehouse areas include:
 - (a) Plumbing (excluding toilets);
 - (b) Load levelers;
 - (c) Loading ramp; and
 - (d) Floor drains.

5. How Is Special Space Classified?

Special space is space that necessitates the expenditure of additional or varying sums to construct, maintain, and/or operate as compared with the amount spent for office and storage space.

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- a. Laboratory and clinic area (SP-1) are spaces that contain built-in equipment and utilities required for the qualitative or quantitative analysis of matter, experimentation, the processing of materials, and/or the physical welfare of employees. Laboratory and clinic areas include:
- (1) Wet laboratories;
 - (2) Clean laboratories;
 - (3) Photographic laboratories;
 - (4) Clinics;
 - (5) Health units and rooms with special equipment;
 - (6) Private toilets;
 - (7) Wellness/physical fitness facility shower rooms; and
 - (8) Child care facility toilets.
- b. Food service areas (SP-2) is space devoted to the preparation and dispensing of foodstuffs including:
- (1) Cafeterias including kitchens, related storage and service areas;
 - (2) Snack bars;
 - (3) Mechanical vending areas with plumbing; and
 - (4) Private kitchens with plumbing.
- c. Structurally changed areas (SP-3) are areas having architectural features differing from normal office or storage areas. These features may include sloped floors, high ceilings, increased floor loading, steel mesh within partitioning, sound conditioning over sound transmission coefficient (STC)-40 rating including:

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- (1) Auditoriums;
 - (2) Gymnasiums;
 - (3) Libraries with special stacks and floor loading;
 - (4) Target ranges;
 - (5) Courtrooms with ceiling height exceeding 11 feet;
 - (6) Security vaults;
 - (7) Secured compartmented information facility (SCIF); and
 - (8) Detention cells.
- d. Automatic data processing (ADP) areas (SP-4) are areas having special features such as humidity and temperature control; raised flooring and ceiling heights exceeding office standard; and extensive power requirements requiring its own power panels, etc. ADP areas include:
- (1) Computer rooms and telecommunication rooms with special environmental requirements;
 - (2) Computer support areas with special flooring and/or wiring and with humidity and/or temperature control; and
 - (3) Computer tape vaults.
- e. Conference and classroom/training/library facilities/supplemental air-conditioned space (SP-5) consists of areas used for conferences, training, library, hearings or mini-computer use with supplemental HVAC and/or built-in special equipment. Special equipment may include blackout curtains, blackboards, projection screens, lighting controls, projection booths and sounding conditioning, and extra floor loading for book stacks or special files in addition to office finishes. Areas in this classification include:
- (1) Conference rooms with special equipment and/or HVAC;

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- (2) Hearing rooms with special equipment and/or HVAC;
 - (3) Classroom/training rooms with special equipment and/or HVAC;
 - (4) Exhibit areas with special equipment and/or HVAC;
 - (5) Courtrooms without structural changes but with special equipment;
 - (6) Table areas in cafeterias with supplementary HVAC or other special features; and
 - (7) Mini-computer/mega frame equipment rooms adjacent to office area requiring supplemental HVAC and minor special buildout such as deadbolt locks, dedicated electrical service, LAN cable distribution access, etc., (rooms requiring substantially less than SP-4 buildout).
- f. Light industrial areas (SP-6) are areas which may have some or all of the characteristics of warehouse space but, in addition, may be provided with one or more of the following features: air-conditioning, humidity control, special power and a light level equal to or slightly less than that provided for office space including:
- (1) Records storage with humidity control;
 - (2) Storage type space with air-conditioning;
 - (3) Printing plants;
 - (4) Product classifying laboratories;
 - (5) Motor pool service areas;
 - (6) Postal workrooms, swingrooms, locker rooms, mailing vestibules and platforms, and lock box lobbies;
 - (7) Shops;
 - (8) Loading docks and shipping platforms;

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- (9) Canopy areas (if included in occupiable area);
- (10) Vertical improved mail system areas; and
- (11) Telephone frame rooms and unattended switchboards (for specific Agency use).

6. What Alterations Can I Make to Special Space?

- a. Standard Level Alterations. Initial alterations will be provided in accordance with the levels specified for office space. In addition, they may include the installation of special building equipment to meet the environmental requirements of the laboratory and/or clinic as shown below:
 - (1) Laboratory And/or Clinic.
 - (a) Floors. Special floors such as quarry tile, grating, etc., will be provided by GSA as required.
 - (b) Plumbing and Sewage. As required, special building equipment such as special piping and associated water treatment equipment, special sewage disposal systems, and water, gas, compressed air and vacuum systems will be provided by GSA. Normal hookup will be provided to the space perimeter consistent with architectural, mechanical, electrical, and structural limitations.
 - (c) Electrical Distribution. Electrical service, including normal hookup, will be provided consistent with architectural, mechanical, electrical, and structural limitations.
 - (d) Heating, Ventilation, and Air-Conditioning. As required, special building equipment, to treat and exhaust to the atmosphere toxic gases produced by program equipment, will be provided. In addition, fresh air suitable to meet the special requirements, up to 100 percent fresh air, temperature control plus or minus 2 degrees within the design range, and humidity control plus or minus 5 percent within the design range will be provided.
 - (2) Food service areas will be provided with initial alterations in

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accordance with the levels specified for office space, with additions or exceptions as follows:

- (a) Floors. Floors will be nonslip tile or quarry tile with covered base molding in large commercial type kitchen areas.
 - (b) Surface Areas. Food preparation areas will have smooth surface, washable ceilings, partitions, and walls.
 - (c) Heating, Ventilation, and Air-Conditioning. HVAC will be provided that is capable of maintaining an acceptable operating environment in food preparation areas, vending machine rooms, and other concession areas having heat generating equipment.
 - (d) Electrical Service. The GSA will provide electrical service, including normal hookup, consistent with architectural, mechanical, electrical and structural limitations.
 - (e) Telephone Service. The GSA will install telephone conduit for telephone distribution. Telephone service will not be provided by GSA in concession or blind operated facilities.
 - (f) Plumbing. Plumbing will be provided as required for water, gas, and waste systems, including normal hookup, consistent with architectural, mechanical, electrical, and structural limitations.
 - (g) Special Equipment. Alterations for special equipment will be provided by GSA on a case-by-case basis.
- (3) Structurally changed areas will be provided with initial alterations at levels required to provide standard features normally associated with the type of space being provided. Determination of the normal level will be made by GSA on a case-by-case basis using both industry and GSA-recognized standards.
- (4) Automatic data processing areas will be provided with initial alterations in accordance with levels specified for office space, with additions or exceptions as follows.
- (a) Raised Floors. If required, raised floors will be installed to provide

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space for electrical and/or HVAC service for ADP equipment.

- (b) Ceilings. As determined by GSA, ceilings will be provided that are acoustically treated and sound conditioned to provide a minimum sound STC rating of 45.
 - (c) Heating, Ventilation, and Air-Conditioning. HVAC will be provided that is capable of maintaining an operating environment for the ADP equipment compatible with the manufacturer's recommendation.
 - (d) Electrical Service. Electrical distribution and service will include a normal hookup to a power panel within the ADP room.
 - (e) Sprinkler Protection. Wet pipe sprinkler protection will be provided in all electronic equipment and tape storage areas.
- (5) Conference and Classroom/Training/Library Facilities/Supplemental Air-conditioned Space (SP-5). SLAs for these areas will be provided initial alterations in accordance with levels specified for office space, with additions or exceptions as follows.
- (a) Slab to slab above walls.
 - (b) Ceilings. Ceilings will be provided that are acoustically treated to provide a minimum sound transmission coefficient of 45 (STC 45).
 - (c) Perimeter Walls. Perimeter walls will be sound conditioned, as determined by GSA, to provide a minimum sound transmission class of 45 (STC 45).
 - (d) Heating, Ventilation, and Air-Conditioning. Supplemental, separately zoned HVAC will be provided in conformance with GSA standards.
 - (e) Special Features. Special features normally associated with the subcategories of space under this classification are determined by GSA on a case-by-case basis.

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- (6) Light industrial areas will be provided with initial alterations at levels required to provide standard architectural, mechanical, electrical, and structural features normally associated with this type of space. Determination of the normal level will be made by GSA on a case-by-case basis using commercial standards.
- b. Typical Above-Standard Alterations.
 - (1) Laboratory and clinic space include the following:
 - (a) Emergency showers;
 - (b) Eye wash stations; and
 - (c) Revolving darkroom doors.
 - (2) ADP areas include:
 - (a) Isolation transformers;
 - (b) Emergency shutdown control switches;
 - (c) Uninterruptible power supplies;
 - (d) Audible and visible alarms;
 - (e) Special security locks; and
 - (f) Supplemental Halon fire suppression systems.

Appendix 8
(Paragraph 3-31)
RESPONSIBILITY FOR RELOCATION EXPENSES

A summary of relocation situation and identification of the responsible party (GSA, SBA, or displaced Agency) for the different types of expenses, is as follows:

<u>MOVE SITUATIONS</u>	<u>SLA'S</u>	<u>ABOVE STANDARD</u>	<u>MOVING COSTS</u>	<u>TELECOM.</u>
Lease Expiration -	GSA	SBA	GSA	SBA
SBA Expansion -				
1. Avail Contiguous	GSA	SBA	GSA	SBA
2. Unavail Contiguous	GSA	SBA	GSA	SBA
3. Split Assignment	GSA	SBA	GSA	SBA
4. Displaces SBA				
A. SBA	GSA	Expanding Agency	Expanding Agency	SBA
B. Expanding Agency	GSA	Expanding Agency	SBA	Displaced Agency
Consolidation -				
1. At Lease Expiration	GSA	SBA	GSA	SBA
2. GSA Directed	GSA	GSA	GSA	SBA
Emergency Relocation	GSA	GSA	GSA	SBA

Appendix 9
(Paragraph 4-4c)
Sample GSA Form 2957, Reimbursable Work Authorization

REIMBURSABLE WORK AUTHORIZATION				1. Date Of Request		2. RWA Number <small>GSA Use Only</small>	
3. Name Of Agency				4. Work Site			
5a. Agency Contact Name				5e. Contact Address			
5b. Telephone	Area Code	Phone Number	Ext.				
5c. Fax	Area Code	Phone Number					
5d. E-Mail							
6. Description Of Requested Work							
Check As Appropriate		10. Requested Work Dates		13a. Fed Code		13b. Bureau Code	
<input type="checkbox"/> 7. Plans Attached		a. Start		14a. Agency Billing Address			
<input type="checkbox"/> 8. Modification		b. Completion					
9a. Billing Type		11. Agency Certified Amt.					
9b. Billing Terms							
12a. Agency Location Code		12b. Agency ID #	12c. Fund Code	14b. City		14c. State	14d. Zip Code
12d. Agency Accounting Data (Limited to 60 Characters)				16a. Credit Card Number		16b. Exp. Date	
15a. Certifying Official's Name (Print)			15b. Date	16c. Type Of Card		16d. Card Holder's Name (Print)	
15c. Certifying Official's Signature				17. Certifying Official's Phone Number			
				Area Code		Phone Number	
						Ext.	
<small>GSA will bill in accordance with FPMR Part 101-21.604(e)</small>							
FOR GENERAL SERVICES ADMINISTRATION USE ONLY							
18. Project No.		19a. Organization Code		19b. B/A Code	19c. BOAC Code		19d. Corr. Symbol
20. Brief Project Description (Limited to 25 Characters)							
21. Action (Check One)				22. Please Check If Appropriate			
<input type="checkbox"/> New <input type="checkbox"/> Change <input type="checkbox"/> Delete <input type="checkbox"/> Complete				<input type="checkbox"/> Cost Breakdown Attached <input type="checkbox"/> Multiple Bldg. Function			
23. <input type="checkbox"/> Fixed Price Does Not Apply				24. <input type="checkbox"/> Guarantee Does Not Apply		25. Agreed Upon Completion Date	
26a. Organization Code	26b. Building Number	26c. Lease Number		26d. F/C	26e. O/C	26f. Total	
27a. GSA Approving Official's Signature				27b. Date	27c. Telephone Number		
					Area Code Number Ext.		
27d. Signer's Name (Print)				28. Credit Card Point of Sale Terminal			
				<input type="checkbox"/> a. Finance <input type="checkbox"/> b. PBS			
29a. Certificate Of Completion Signature				29b. Signer's Name (Print)		29c. Completion Date	

KEEP A COPY FOR YOUR RECORDS AND FORWARD ONE COPY TO YOUR OBLIGATING/PAYING OFFICE
GENERAL SERVICES ADMINISTRATION
GSA FORM 2957 (REV. 6-97)
 PRESCRIBED IN PBS P 7000.2A

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Instructions For RWA Form

1. Enter Date of work request.
2. Leave RWA Block Blank . GSA Use Only.
3. Enter name of Agency requesting the work.
4. Enter location where work is to be performed. If multiple locations, use attachment (below).
- 5a-e. Enter information regarding the individual with the authority to make decisions regarding the project.
6. Enter a concise statement of work to be done, including location where work is to be performed.
7. Check if Agency plans are attached.
8. Check if submittal is a modification to an existing RWA.
- 9a. Enter billing type: I = Interfund, C = Credit Card, P = Pre-paid
- 9b. Enter billing terms: A = Advance, C = At completion, M = Monthly, Q = Quarterly, T = At Termination, Y = Annually (in arrears).
Non-recurring RWA's under \$25,000 will be billed at project completion. Default for billing is monthly for projects over \$25,000.
- 10a-b. Enter requested project start and completion dates.
11. Enter the total dollar amount approved for funding. Must match GSA's cost quote.
- 12a. Enter the eight (8) character Agency Location Code. (Treasury Pay-Station Designator)
- 12b. Enter the appropriate agency identification number.
- 12c. Enter the appropriate agency fund code.
- 12d. Enter agency accounting information (Limited to 60 characters). **THIS WILL APPEAR ON YOUR BILL!**
- 13a. Enter the agency Fed Code. 13b. Enter the Agency Bureau Code.
- 14a-d. Enter the appropriate billing address information.
- 15a-c. Enter date, signature and name of agency's authorized representative, certifying the validity of order and the availability of funds.
- 16a-d. Enter the credit card number, type of card, card holder's name and expiration date. (You may contact your GSA Representative and provide the information confidentially.)
17. Enter the certifying official's phone number.

GSA Portion

18. Enter project number, if applicable.
19. a. Enter GSA Organization Code. b. enter B/A Code. c. enter BOAC Code. d. enter the Organization Correspondence Symbol.
20. Enter a brief project description, limited to 25 characters.
21. Check the appropriate action block.
22. Check box(es) if appropriate.
23. Check if the project is **NOT** fixed price. If the project is to be actual cost instead of fixed price, the requesting agency contact should be advised that his/her agency is responsible for all actual costs, including overhead.
24. Check if the guarantee **DOES NOT** apply.
25. Enter the mutually agreed upon completion date.
- 26a-f. Enter the Organization Code, Building Number, Lease Number, Function Code, Object Class and Total Dollar Amount.
- 27a-d. Enter the signature, name, date, and telephone number of the GSA Approving Official.
28. Enter the Point of Sale Terminal (For Credit Card Purchases Only).
- 29a-c. Enter the certificate of completion signature, name and date when the project was physically completed.

ATTACHMENT - FOR MULTIPLE BUILDINGS/MULTIPLE FUNCTION

[illegible]

Appendix 10 (Paragraph 5b-2)

Sample SBA Form 2, Requisition for Supplies, Services and Federal Assistance

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[illegible]